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Form **990-PF**

Department of the Treasury
Internal Revenue Service

# Return of Private Foundation
## or Section 4947(a)(1) Nonexempt Chantable Trust Treated as a Pnvate Foundation

**Note** *The organization may be able to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-0052

**2001**

For calendar year 2001, or tax year beginning , 2001, and ending ,

G Check all that apply | Initial return | Final return | Amended return | Address Change | Name change

Use the IRS label Otherwise, print or type See Specific Instructions

Name of Organization: Wexner Foundation

Number and Street (or P O box number if mail is not delivered to street address) Room/Suite: 6525 West Campus Oval Suite 105

City or Town: New Albany State: Oh ZIP code: 43054

A Employer Identification Number: 23-7320631

B Telephone Number (see instructions): (614) 939-6060

C If exemption application is pending, check here ►

D 1 Foreign organizations, check here ►

2 Foreign organizations meeting the 85% test check here and attach computation ►

E If private foundation status was terminated under section 507(b)(1)(A), check here ►

F If the foundation is in a 60 month termination under section 507(b)(1)(B), check here ►

H Check type of organization [X] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, column c, line 16)* ► $ 11,326,275

J Accounting method [X] Cash [ ] Accrual [ ] Other (specify)
*(Part I, column d must be on cash basis )*

| Part I Analysis of Revenue and Expenses *(The total of amounts in columns b c and d may not neces sarily equal the amounts in column a ) (see instructions)* | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|---|---|---|---|
| 1 Contributions gifts, grants etc received (att sch) | 9,588,560 | | | |
| Ck ► [ ] if the foundn is not req to att Sch B | | | | |
| 2 Distributions from split interest trusts | | | | |
| 3 Interest on savings and temporary cash investments | 74,184 | 74,184 | 74,184 | |
| 4 Dividends and interest from securities | 116,993 | 116,993 | 116,993 | |
| 5a Gross rents | | | | |
| b (Net rental income or (loss) ) | | | | |
| 6a Net gain/(loss) from sale of assets not on line 10 | 9,197,447 | | | |
| b Gross sales prices for all assets on line 6a 12,090,768 | | | | |
| 7 Capital gain net income (from Part IV line 2) | | 12,090,768 | | |
| 8 Net short term capital gain | | | 0 | |
| 9 Income modifications | | | | |
| 10a Gross sales less returns and allowances | | | | |
| b Less Cost of goods sold | | | | |
| c Gross profit/(loss) (att sch) | | | | |
| 11 Other income (attach schedule) | | | | |
| 12 **Total** Add lines 1 through 11 | 18,977,184 | 12,281,945 | 191,177 | |
| 13 Compensation of officers directors trustees, etc | 281,000 | | | 281,000 |
| 14 Other employee salaries and wages | 774,712 | | | 774,712 |
| 15 Pension plans, employee benefits | 126,634 | | | 126,634 |
| 16a Legal fees (attach schedule) L-16a Stmt | 3,431 | | | 3,431 |
| b Accounting fees (attach sch) L-16b Stmt | 28,121 | 2,812 | 2,812 | 25,309 |
| c Other prof fees (attach sch) L-16c Stmt | 8,486 | | | 8,486 |
| 17 Interest | | | | |
| 18 Taxes (attach schedule) See Line 18 Stmt | 203,337 | | | 203,337 |
| 19 Depreciation (attach schedule) and depletion | 8,338 | | | |
| 20 Occupancy | 147,499 | | | 147,499 |
| 21 Travel, conferences, and meetings | 1,336,614 | | | 1,336,614 |
| 22 Printing and publications | 81,642 | | | 81,642 |
| 23 Other expenses (attach schedule) See Line 23 Stmt | 391,653 | | | 391,653 |
| 24 **Total operating and administrative expenses** Add lines 13 through 23 | 3,391,467 | 2,812 | 2,812 | 3,380,317 |
| 25 Contributions, gifts, grants paid | 10,047,144 | | | 10,047,144 |
| 26 **Total expenses and disbursements** Add lines 24 and 25 | 13,438,611 | 2,812 | 2,812 | 13,427,461 |
| 27 Subtract line 26 from line 12 | | | | |
| a **Excess of revenue over expenses and disbursements** | 5,538,573 | | | |
| b **Net investment income** (if negative enter -0 ) | | 12,279,133 | | |
| c **Adjusted net income** (if negative enter -0 ) | | | 188,365 | |

REVENUE

OPERATING AND ADMINISTRATIVE EXPENSES

SCANNED SEP 12 2002

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433
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14

**Part II Balance Sheets** Attached schedules and amounts in the description column should be for end of year amounts only (See instructions)

| | | Beginning of year | End of year | |
|---|---|---|---|---|
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| ASSETS | 1 Cash – non interest bearing | 49,893 | 55,198 | 55,198 |
| | 2 Savings and temporary cash investments | 2,633,003 | 11,073,652 | 11,073,652 |
| | 3 Accounts receivable ► | | | |
| | Less allowance for doubtful accounts ► | | | |
| | 4 Pledges receivable ► | | | |
| | Less allowance for doubtful accounts ► | | | |
| | 5 Grants receivable | | | |
| | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) | | | |
| | 7 Other notes and loans receivable (attach sch) ► | | | |
| | Less allowance for doubtful accounts ► | | | |
| | 8 Inventories for sale or use | | | |
| | 9 Prepaid expenses and deferred charges | 154,478 | 130,682 | 130,682 |
| | 10a Investments – U S and state government obligations (attach schedule) | | | |
| | b Investments – corporate stock (attach schedule) L-10b Stmt | 2,893,321 | 0 | 0 |
| | c Investments – corporate bonds (attach schedule) | | | |
| | 11 Investments – land, buildings, and equipment basis ► | | | |
| | Less accumulated depreciation (attach schedule) ► | | | |
| | 12 Investments – mortgage loans | | | |
| | 13 Investments – other (attach schedule) | | | |
| | 14 Land, buildings, and equipment basis ► 264,410 | | | |
| | Less accumulated depreciation (attach schedule) ► 197,667 | 69,755 | 66,743 | 66,743 |
| | 15 Other assets (describe ► ) | | | |
| | 16 **Total assets** (to be completed by all filers – see instructions Also, see page 1, item I) | 5,800,450 | 11,326,275 | 11,326,275 |
| LIABILITIES | 17 Accounts payable and accrued expenses | | | |
| | 18 Grants payable | | | |
| | 19 Deferred revenue | | | |
| | 20 Loans from officers, directors, trustees, & other disqualified persons | | | |
| | 21 Mortgages and other notes payable (attach schedule) | | | |
| | 22 Other liabilities (describe ► ) | | | |
| | 23 **Total liabilities** (add lines 17 through 22) | | | |
| NET ASSETS OR FUND BALANCES | **Organizations that follow SFAS 117, check here ► ☐ and complete lines 24 through 26 and lines 30 and 31** | | | |
| | 24 Unrestricted | | | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | **Organizations that do not follow SFAS 117, check here ► ☒ and complete lines 27 through 31** | | | |
| | 27 Capital stock, trust principal, or current funds | 5,800,450 | 11,326,275 | |
| | 28 Paid in or capital surplus, or land, building, and equipment fund | | | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | | | |
| | 30 **Total net assets or fund balances** (see instructions) | 5,800,450 | 11,326,275 | |
| | 31 **Total liabilities and net assets/fund balances** (see instructions) | 5,800,450 | 11 326,275 | |

**Part III Analysis of Changes in Net Assets or Fund Balances**

| | | | |
|---|---|---|---|
| 1 | Total net assets or fund balances at beginning of year – Part II, column (a) line 30 (must agree with end of year figure reported on prior year s return) | 1 | 5,800,450 |
| 2 | Enter amount from Part I, line 27a | 2 | 5,538,573 |
| 3 | Other increases not included in line 2 (itemize) ► Rounding | 3 | 1 |
| 4 | Add lines 1, 2, and 3 | 4 | 11,339,024 |
| 5 | Decreases not included in line 2 (itemize) ► Depreciation | 5 | 12,749 |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30 | 6 | 11,326,275 |

**Part IV Capital Gains and Losses for Tax on Investment Income**

| | (a) List and describe the kind(s) of property sold (e g , real estate, 2 story brick warehouse, or common stock, 200 shares MLC Company) | (b) How acquired P — Purchase D — Donation | (c) Date acquired (month day year) | (d) Date sold (month day year) |
|---|---|---|---|---|
| 1a | 3,190 shares of Too, Inc | D | 07/10/78 | 02/28/01 |
| b | 77,999 shares of Too, Inc | D | 07/10/78 | 02/28/01 |
| c | 68 shares of ANF | D | 07/10/78 | 05/01/01 |
| d | 200,000 shares of LTD, Inc | D | 07/10/78 | 04/19/01 |
| e | See Attached Part IV, Line 1 Stmt | | | |

| | (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|---|---|---|---|---|
| a | 61,622 | | 0 | 61,622 |
| b | 1,485,597 | | 0 | 1,485,597 |
| c | 2,219 | | 0 | 2,219 |
| d | 3,149,092 | | 0 | 3,149,092 |
| e | | | | |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (column (h) gain minus column (k), but not less than 0 ) or Losses (from column (h)) |
|---|---|---|---|
| (i) Fair Market Value as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of column (i) over column (j), if any | |
| a | | | 61,622 |
| b | | | 1,485,597 |
| c | | | 2,219 |
| d | | | 3,149,092 |
| e | | | 7,392,238 |

| | | | |
|---|---|---|---|
| 2 | Capital gain net income or (net capital loss) — If gain, also enter in Part I, line 7; If (loss), enter 0 in Part I, line 7 | 2 | 12,090,768 |
| 3 | Net short term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter 0 in Part I, line 8 | 3 | |

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income )

If section 4940(d)(2) applies, leave this part blank

Was the organization liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If Yes, the organization does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable use assets | (d) Distribution ratio (column (b) divided by column (c)) |
|---|---|---|---|
| 2000 | 20,357,506 | 29,906,716 | 0 680700 |
| 1999 | 13,268,221 | 38,915,819 | 0 340947 |
| 1998 | 13,137,445 | 38,487,629 | 0 341342 |
| 1997 | 13,860,664 | 37,424,224 | 0 370366 |
| 1996 | 17,263,161 | 49,121,162 | 0 351440 |

| | | | |
|---|---|---|---|
| 2 | **Total** of line 1, column (d) | 2 | 2 084795 |
| 3 | Average distribution ratio for the 5 year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | 3 | 0 416959 |
| 4 | Enter the net value of noncharitable use assets for 2001 from Part X, line 5 | 4 | 10,410,868 |
| 5 | Multiply line 4 by line 3 | 5 | 4,340,905 |
| 6 | Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 122,791 |
| 7 | Add lines 5 and 6 | 7 | 4,463,696 |
| 8 | Enter qualifying distributions from Part XII, line 4 | 8 | 13 427,461 |

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

## Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

| | | | |
|---|---|---|---|
| 1a | Exempt operating foundations described in Section 4940(d)(2), check here ► ☐ and enter N/A on line 1. Date of ruling letter _____ (attach copy of ruling letter if necessary – see instructions) | | |
| b | Domestic organizations that meet the Section 4940(e) requirements in Part V, check here ► ☒ and enter 1% of Part I, line 27b | 1 | 122,791 |
| c | All other domestic organizations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b) | | |
| 2 | Tax under Section 511 (domestic Section 4947(a)(1) trusts and taxable foundations only. Others enter 0) | 2 | 0 |
| 3 | Add lines 1 and 2 | 3 | 122,791 |
| 4 | Subtitle A (income) tax (domestic Section 4947(a)(1) trusts and taxable foundations only. Others enter 0) | 4 | 0 |
| 5 | **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter 0 | 5 | 122,791 |
| 6 | Credits/Payments | | |
| a | 2001 estimated tax pmts and 2000 overpayment credited to 2001 — 6a: 119,926 | | |
| b | Exempt foreign organizations – tax withheld at source — 6b: | | |
| c | Tax paid with application for extension of time to file (Form 8868) — 6c: 2,893 | | |
| d | Backup withholding erroneously withheld — 6d: | | |
| 7 | Total credits and payments. Add lines 6a through 6d | 7 | 122,819 |
| 8 | Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached | 8 | |
| 9 | **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ► | 9 | |
| 10 | **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ► | 10 | 28 |
| 11 | Enter the amount on line 10 to be: **Credited to 2002 estimated tax** ► 28 **Refunded** ► | 11 | |

## Part VII-A Statements Regarding Activities

| | | | Yes | No |
|---|---|---|---|---|
| 1a | During the tax year, did the organization attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | 1a | | X |
| b | Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? | 1b | | X |
| | *If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the organization in connection with the activities* | | | |
| c | Did the organization file **Form 1120-POL** for this year? | 1c | | X |
| d | Enter the amount (if any) of tax on political expenditures (Section 4955) imposed during the year: (1) On the organization ► $ _____ (2) On organization managers ► $ _____ | | | |
| e | Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on organization managers ► $ _____ | | | |
| 2 | Has the organization engaged in any activities that have not previously been reported to the IRS? *If 'Yes,' attach a detailed description of the activities* | 2 | | X |
| 3 | Has the organization made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If 'Yes,' attach a conformed copy of the changes* | 3 | | X |
| 4a | Did the organization have unrelated business gross income of $1,000 or more during the year? | 4a | | X |
| b | If 'Yes,' has it filed a tax return on **Form 990-T** for this year? | 4b | | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T* | 5 | | X |
| 6 | Are the requirements of Section 508(e) (relating to Sections 4941 through 4945) satisfied either • By language in the governing instrument or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | 6 | X | |
| 7 | Did the organization have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV* | 7 | X | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) ► Ohio, New York | | | |
| b | If the answer is 'Yes' to line 7, has the organization furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If 'No,' attach explanation* | 8b | X | |
| 9 | Is the organization claiming status as a private operating foundation within the meaning of Section 4942(j)(3) or 4942(j)(5) for calendar year 2001 or the taxable year beginning in 2001 (see instructions for Part XIV)? *If 'Yes,' complete Part XIV* | 9 | | X |
| 10 | Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses* | 10 | | X |
| 11 | Did the organization comply with the public inspection requirements for its annual returns and exemption application? | 11 | X | |
| | Web site address ► N/A | | | |
| 12 | The books are in care of ► Jeffrey Epstein Telephone no ► (614) 939-6000 | | | |
| | Located at ► 6525 W Campus Oval, Suite 105, New Albany, Oh ZIP + 4 ► 43054 | | | |
| 13 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here ► ☐ and enter the amount of tax exempt interest received or accrued during the year ► 13 | | | |

## Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

| File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies | | | Yes | No |
|---|---|---|---|---|
| 1a During the year did the organization (either directly or indirectly) | | | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | ☐ Yes | ☒ No | | |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? | ☐ Yes | ☒ No | | |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | ☐ Yes | ☒ No | | |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | ☒ Yes | ☐ No | | |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? | ☐ Yes | ☒ No | | |
| (6) Agree to pay money or property to a government official? (**Exception** Check No if the organization agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ) | ☐ Yes | ☒ No | | |
| b If any answer is Yes' to 1a(1) (6), did **any** of the acts fail to qualify under the exceptions described in Regulations Section 53 4941(d) 3 or in a current notice regarding disaster assistance (see instructions)? | | 1b | | X |
| Organizations relying on a current notice regarding disaster assistance check here ► ☐ | | | | |
| c Did the organization engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2001? | | 1c | | X |
| 2 Taxes on failure to distribute income (Section 4942) (does not apply for years the organization was a private operating foundation defined in Section 4942(j)(3) or 4942(j)(5)) | | | | |
| a At the end of tax year 2001, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2001? | ☐ Yes | ☒ No | | |
| If Yes,' list the years ► 20__ , 19__ , 19__ , 19__ | | | | |
| b Are there any years listed in 2a for which the organization is **not** applying the provisions of Section 4942(a)(2) (relating to incorrect valuation of assets) to the year s undistributed income? (If applying Section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see instructions ) | | 2b | | X |
| c If the provisions of Section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ► 20__ , 19__ , 19__ , 19__ | | | | |
| 3a Did the organization hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | ☐ Yes | ☒ No | | |
| b If Yes, did it have excess business holdings in 2001 as a result of **(1)** any purchase by the organization or disqualified persons after May 26, 1969, **(2)** the lapse of the 5 year period (or longer period approved by the Commissioner under Section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10 , 15 , or 20 year first phase holding period? *(Use Schedule C Form 4720, to determine if the organization had excess business holdings in 2001 )* | | 3b | | |
| 4a Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a | | X |
| b Did the organization make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2001? | | 4b | | X |
| 5a During the year did the organization pay or incur any amount to | | | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (Section 4945(e))? | ☐ Yes | ☒ No | | |
| (2) Influence the outcome of any specific public election (see Section 4955), or to carry on, directly or indirectly, any voter registration drive? | ☐ Yes | ☒ No | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes? | ☐ Yes | ☒ No | | |
| (4) Provide a grant to an organization other than a charitable, etc, organization described in Section 509(a)(1), (2), or (3), or Section 4940(d)(2)? | ☒ Yes | ☐ No | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? | ☐ Yes | ☒ No | | |
| b If any answer is 'Yes' to 5a(1) (5), did **any** of the transactions fail to qualify under the exceptions described in Regulations Section 53 4945 or in a current notice regarding disaster assistance (see instructions)? | | 5b | | X |
| Organizations relying on a current notice regarding disaster assistance check here ► ☐ | | | | |
| c If the answer is 'Yes' to question 5a(4), does the organization claim exemption from the tax because it maintained expenditure responsibility for the grant? | ☒ Yes | ☐ No | | |
| *If Yes,' attach the statement required by Regulations Section 53 4945-5(d)* | | | | |
| 6a Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | ☐ Yes | ☒ No | | |
| b Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | 6b | | X |
| *If you answered Yes' to 6b also file 8870* | | | | |

**Part VIII** **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

1 List all officers directors, trustees, foundation managers and their compensation (see instructions)

| (a) Name and address | (b) Title and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---|
| Leslie H Wexner<br>6525 W Campus Oval, New Albany, Oh43054 | Chairman<br>As Required | 0 | 0 | 0 |
| Rabbi Maurice Corson<br>PO Box 284, Otis Ma 01253 | President Emeritus<br>As Required | 0 | 0 | 0 |
| Darren Indyke<br>457 Madison Ave , NY, NY | Secretary<br>As Required | 0 | 0 | 0 |
| See Part VIII Line 1 Stmt | | 281,000 | 10,500 | 0 |

2 Compensation of five highest-paid employees (other than those included on line 1– see instructions) If none, enter 'None '

| (a) Name and address of each employee *paid more than $50,000* | (b) Title and average *hours per week* devoted to position | (c) Compensation | (d) Contributions to *employee benefit* plans and deferred compensation | (e) Expense account, *other allowances* |
|---|---|---|---|---|
| Cindy Chazan<br>53 Speir Dr , S Orange, NJ 07079 | Director of Programs<br>40hours | 223,750 | 0 | 0 |
| Barbara Abrahamson<br>2123 Fair Ave , Bexley, Oh 43209 | Director of Programs<br>40hours | 219,016 | 9,000 | 0 |
| Karen Collum<br>5779 Albany Green Westerville, Oh 43081 | Asst to President<br>40hours | 60,820 | 3,900 | 0 |
| | | | | |
| | | | | |

**Total** number of other employees paid over $50,000 ► None

3 Five highest-paid independent contractors for professional services – (see instructions) If none, enter 'None '

| (a) Name and address of each person paid more than $50,000 | (b) Type of service | (c) Compensation |
|---|---|---|
| None | | |
| | | |
| | | |
| | | |
| | | |
| | | |

**Total** number of others receiving over $50,000 for professional services ► None

**Part IX-A** **Summary of Direct Charitable Activities**

| List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc | Expenses |
|---|---|
| 1 NONE | 0 |
| 2 | |
| 3 | |
| 4 | |

## Part IX-B Summary of Program-Related Investments (see instructions)

| Describe the two largest program related investments made by the foundation during the tax year on lines 1 and 2 | Amount |
|---|---|
| 1 None | 0 |
| 2 | |
| All other program related investments See instructions | |
| 3 | |
| Total Add lines 1 through 3 ► | None |

## Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see instructions )

| | | | |
|---|---|---|---|
| 1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes | | | |
| a Average monthly fair market value of securities | | 1a | 7,146,647 |
| b Average of monthly cash balances | | 1b | 3,211,933 |
| c Fair market value of all other assets (see instructions) | | 1c | 210,829 |
| d **Total** (add lines 1a, b and c) | | 1d | 10,569,409 |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 1e 0 | | |
| 2 Acquisition indebtedness applicable to line 1 assets | | 2 | 0 |
| 3 Subtract line 2 from line 1d | | 3 | 10,569,409 |
| 4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) | | 4 | 158,541 |
| 5 **Net value of noncharitable-use assets** Subtract line 4 from line 3 Enter here and on Part V, line 4 | | 5 | 10,410,868 |
| 6 **Minimum investment return** Enter 5% of line 5 | | 6 | 520,543 |

## Part XI Distributable Amount (see instructions)

(Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ► ☐ and do not complete this part )

| | | | |
|---|---|---|---|
| 1 Minimum investment return from Part X, line 6 | | 1 | 520,543 |
| 2a Tax on investment income for 2001 from Part VI, line 5 | 2a 122,791 | | |
| b Income tax for 2001 (This does not include the tax from Part VI ) | 2b | | |
| c Add lines 2a and 2b | | 2c | 122,791 |
| 3 Distributable amount before adjustments Subtract line 2c from line 1 | | 3 | 397,752 |
| 4a Recoveries of amounts treated as qualifying distributions | 4a | | |
| b Income distributions from section 4947(a)(2) trusts | 4b | | |
| c Add lines 4a and 4b | | 4c | |
| 5 Add lines 3 and 4c | | 5 | 397,752 |
| 6 Deduction from distributable amount (see instructions) | | 6 | |
| 7 **Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1 | | 7 | 397,752 |

## Part XII Qualifying Distributions (see instructions)

| | | |
|---|---|---|
| 1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes | | |
| a Expenses, contributions, gifts, etc -- total from Part I, column (d), line 26 | 1a | 13,427,461 |
| b Program related investments – Total from Part IX B | 1b | 0 |
| 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes | 2 | |
| 3 Amounts set aside for specific charitable projects that satisfy the | | |
| a Suitability test (prior IRS approval required) | 3a | |
| b Cash distribution test (attach the required schedule) | 3b | |
| 4 **Qualifying distributions** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 13,427,461 |
| 5 Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions) | 5 | 122,791 |
| 6 **Adjusted qualifying distributions** Subtract line 5 from line 4 | 6 | 13,304,670 |

**Note** *The amount on line 6 will be used in Part V column (b) in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years*

**Part XIII Undistributed Income** (see instructions)

| | (a) Corpus | (b) Years prior to 2000 | (c) 2000 | (d) 2001 |
|---|---|---|---|---|
| 1 Distributable amount for 2001 from Part XI, line 7 | | | | 397,752 |
| 2 Undistributed income, if any, as of the end of 2000 | | | | |
| a Enter amount for 2000 only | | | 0 | |
| b Total for prior years 20 00, 19 99, 19 98 | | 0 | | |
| 3 Excess distributions carryover, if any, to 2001 | | | | |
| a From 1996 15,183,725 | | | | |
| b From 1997 12,291,525 | | | | |
| c From 1998 11,482,340 | | | | |
| d From 1999 11,538,584 | | | | |
| e From 2000 19,210,962 | | | | |
| f **Total** of lines 3a through e | 69,707,136 | | | |
| 4 Qualifying distributions for 2001 from Part XII, line 4 ► $ 13,427,461 | | | | |
| a Applied to 2000, but not more than line 2a | | | 0 | |
| b Applied to undistributed income of prior years (Election required – see instructions) | | 0 | | |
| c Treated as distributions out of corpus (Election required – see instructions) | 0 | | | |
| d Applied to 2001 distributable amount | | | | 397,752 |
| e Remaining amount distributed out of corpus | 13,029,709 | | | |
| 5 Excess distributions carryover applied to 2001 *(If an amount appears in column (d), the same amount must be shown in column (a).)* | 0 | | | 0 |
| 6 **Enter the net total of each column as indicated below** | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 82,736,845 | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b | | 0 | | |
| c Enter the amount of prior years undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0 | | |
| d Subtract line 6c from line 6b Taxable amount – see instructions | | 0 | | |
| e Undistributed income for 2000 Subtract line 4a from line 2a Taxable amount – see instructions | | | 0 | |
| f Undistributed income for 2001 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2002 | | | | 0 |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) (see instructions) | 0 | | | |
| 8 Excess distributions carryover from 1996 not applied on line 5 or line 7 (see instructions) | 15,183,725 | | | |
| 9 **Excess distributions carryover to 2002** Subtract lines 7 and 8 from line 6a | 67,553,120 | | | |
| 10 Analysis of line 9 | | | | |
| a Excess from 1997 12,291,525 | | | | |
| b Excess from 1998 11,482,340 | | | | |
| c Excess from 1999 11,538,584 | | | | |
| d Excess from 2000 19,210,962 | | | | |
| e Excess from 2001 13,029,709 | | | | |

**Part XIV | Private Operating Foundations** (see instructions and Part VII A, question 9) N/A

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2001, enter the date of the ruling ►

b Check box to indicate whether the organization is a private operating foundation described in Section ☐ 4942(j)(3) or ☐ 4942(j)(5)

| | Tax year | Prior 3 years | | | |
|---|---|---|---|---|---|
| | (a) 2001 | (b) 2000 | (c) 1999 | (d) 1998 | (e) Total |
| 2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, line 4 for each year listed | | | | | |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | | | | | |
| e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the alternative test relied upon | | | | | |
| a 'Assets' alternative test – enter | | | | | |
| (1) Value of all assets | | | | | |
| (2) Value of assets qualifying under Section 4942(j)(3)(B)(i) | | | | | |
| b 'Endowment' alternative test – Enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | | | | | |
| c Support' alternative test – enter | | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (Section 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in Section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from an exempt organization | | | | | |
| (4) Gross investment income | | | | | |

**Part XV | Supplementary Information** (Complete this part only if the organization had $5 000 or more in assets at any time during the year )

1 **Information Regarding Foundation Managers**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See Section 507(d)(2) )

Leslie H Wexner, One Whitebarn Rd New Albany, Ohio 43054

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

None

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs**

Check here ► ☐ if the organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the organization makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

Larry Moses, President
6525 W Campus Oval, Suite 105, New Albany, Oh 43054
New Albany OHIO 43054 (614) 939-6060

b The form in which applications should be submitted and information and materials they should include

See Attached Pages 9 thru 33

c Any submission deadlines

See Attached Pages 9 thru 33

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

See Attached Pages 9 thru 33

**Part XV Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient<br>Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| a *Paid during the year* | | | | |
| See attached schedule of grants on attached pages 3 thru 8 | | Attached | Attached | 10,047,144 |
| **Total** | | | ► 3a | 10,047,144 |
| b *Approved for future payment* | | | | 0 |
| **Total** | | | ► 3b | 0 |

## Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated | Unrelated business income | | Excluded by section 512, 513 or 514 | | |
|---|---|---|---|---|---|
| | (a) Business code | (b) Amount | (c) Exclusion code | (d) Amount | (e) Related or exempt function income (see instructions) |
| 1 Program service revenue | | | | | |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| f | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash investments | | | 01 | 74,184 | |
| 4 Dividends and interest from securities | | | 01 | 116,993 | |
| 5 Net rental income or (loss) from real estate | | | | | |
| a Debt financed property | | | | | |
| b Not debt financed property | | | | | |
| 6 Net rental income or (loss) from personal property | | | | | |
| 7 Other investment income | | | | | |
| 8 Gain or (loss) from sales of assets other than inventory | | | 01 | 9,197,447 | |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue | | | | | |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| 12 Subtotal Add columns (b), (d), and (e) | | | | 9,388,624 | |
| 13 **Total** Add line 12, columns (b), (d), and (e) | | | | ► 13 | 9,388,624 |

(See worksheet in the instructions for line 13 to verify calculations.)

## Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

| Line No ▼ | Explain below how each activity for which income is reported in column (e) of Part XVI A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See instructions.) |
|---|---|

**Part XVII Information Regarding Transfers to and Transactions and Relationships with Nonchantable Exempt Organizations**

| | | Yes | No |
|---|---|---|---|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in Section 501(c) of the Code (other than Section 501(c)(3) organizations) or in Section 527, relating to political organizations? | | | |
| a Transfers from the reporting organization to a noncharitable exempt organization of | | | |
| (1) Cash | 1a (1) | | X |
| (2) Other assets | 1a (2) | | X |
| b Other transactions | | | |
| (1) Sales of assets to a noncharitable exempt organization | 1b (1) | | X |
| (2) Purchases of assets from a noncharitable exempt organization | 1b (2) | | X |
| (3) Rental of facilities, equipment, or other assets | 1b (3) | | X |
| (4) Reimbursement arrangements | 1b (4) | | X |
| (5) Loans or loan guarantees | 1b (5) | | X |
| (6) Performance of services or membership or fundraising solicitations | 1b (6) | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | X |

d If the answer to any of the above is 'Yes,' complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the organization received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

| (a) Line no | (b) Amount involved | (c) Name of noncharitable exempt organization | (d) Description of transfers, transactions, and sharing arrangements |
|---|---|---|---|
| | | | |
| | | | |
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| | | | |

2a Is the organization directly or indirectly affiliated with, or related to, one or more tax exempt organizations described in Section 501(c) of the Code (other than Section 501(c)(3)) or in Section 527? ☐ Yes ☒ No

b If 'Yes,' complete the following schedule

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here

► Deborah K. Marbach 8-13-02 ► Secretary

Signature of Officer or Trustee — Date — Title

Paid Preparer's Use Only

Preparer's Signature ► Brett Gallagher LPA Date 7/31/02 Check if self employed ► ☐ Preparer's SSN or PTIN (see instructions)

Firm's Name (or yours if self employed), address, and ZIP code ► PricewaterhouseCoopers LLP, 100 East Broad Street, Columbus, Ohio 43215 EIN ► Phone no ►

BAA

**Schedule B**
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

# Schedule of Contributors

Supplementary information for
line 1 of Form 990, 990-EZ and 990-PF (see instructions)

OMB No 1545-0047

**2001**

| Name of Organization | Employer Identification Number |
|---|---|
| Wexner Foundation | 23-7320631 |

*Organization type* (check one)

| Filers of | Section |
|---|---|
| Form 990 or 990 EZ | ☐ 501(c)( ____ ) (enter number) organization |
| | ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation |
| | ☐ 527 political organization |
| Form 990 PF | ☒ 501(c)(3) exempt private foundation |
| | ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | ☐ 501(c)(3) taxable private foundation |

Check if your organization is covered by the **general rule** or a **special rule** (**Note** *Only a Section 501(c)(7) (8) or (10) organization can check box(es) for both the general rule and a special rule – see instructions* )

**General Rule** –

☒ For organizations filing Form 990, 990 EZ, or 990 PF that received, during the year, $5,000 or more (in money or property) from any one contributor (Complete Parts I and II )

**Special Rules** –

☐ For a Section 501(c)(3) organization filing Form 990, or Form 990 EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of $5,000 or 2% of the amount on line 1 of these forms (Complete Parts I and II )

☐ For a Section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990 EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals (Complete Parts I, II, and III )

☐ For a Section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990 EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc, purposes, but these contributions did not aggregate to more than $1,000 (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc, purpose Do not complete any of the Parts unless the general rule applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year ) ► $ _____

**Caution** *Organizations that are not covered by the general rule and/or the special rules do not file Schedule B (Form 990 990 EZ or 990-PF) but* ***must*** *check the box in the heading of their Form 990 Form 990 EZ or on line 1 of their Form 990 PF to certify that they do not meet the filing requirements of Schedule B (Form 990 990 EZ or 990-PF)*

Name of Organization: Wexner Foundation

Employer Identification Number: 23-7320631

**Part I** **Contributors** (see instructions)

| (a) Number | (b) Name, address and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
|---|---|---|---|
| 1 | Arts Interests Trust<br>C/O Jeffrey E Epstein, Am Yacht Harbor, 6100 Red Hook Qrts#2<br>St Thomas VI 00802 | $ 9,588,560 | Person [X]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is noncash contribution ) |
| | | $ | Person [ ]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is noncash contribution ) |
| | | $ | Person [ ]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is noncash contribution ) |
| | | $ | Person [ ]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is noncash contribution ) |
| | | $ | Person [ ]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is noncash contribution ) |
| | | $ | Person [ ]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is noncash contribution ) |

Form **2220**

Department of the Treasury
Internal Revenue Service

# Underpayment of Estimated Tax by Corporations

► See separate instructions
► Attach to the corporation's tax return

OMB No 1545-0142

**2001**

Name: Wexner Foundation

Employer Identification Number: 23-7320631

**Note** *In most cases the corporation **does not** need to file Form 2220 (See Part I below for exceptions ) The IRS will figure any penalty owed and bill the corporation If the corporation does not need to file Form 2220 it may still use it to figure the penalty Enter the amount from line 36 on the estimated tax penalty line of the corporation s income tax return but **do not** attach Form 2220*

## Part I Reasons for Filing — Check the boxes below that apply to the corporation If any boxes are checked, the corporation must file Form 2220, even if it does not owe the penalty If the box on line 1 or line 2 applies, the corporation may be able to lower or eliminate the penalty

1 [X] The corporation is using the annualized income installment method
2 [ ] The corporation is using the adjusted seasonal installment method
3 [ ] The corporation is a large corporation figuring its first required installment based on the prior year s tax

**Note** *The corporation also must file Form 2220 if it has a suspended research credit allowed for the current year (see the instructions for line 4) or it is an indirectly affected taxpayer (see instructions)*

## Part II Figuring the Underpayment

| | | | | |
|---|---|---|---|---|
| 4 | Total tax (see instructions) | | 4 | 122,791 |
| 5a | Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 4 | 5a | | |
| b | Look back interest included on line 4 under Section 460(b)(2) for completed long term contracts or Section 167(g) for depreciation under the income forecast method | 5b | | |
| c | Credit for federal tax paid on fuels (see instructions) | 5c | | |
| d | **Total** Add lines 5a through 5c | | 5d | |
| 6 | Subtract line 5d from line 4 If the result is less than $500, **do not** complete or file this form The corporation does not owe the penalty | | 6 | 122,791 |
| 7 | Enter the tax shown on the corporation s 2000 income tax return **Caution** *See instructions before completing this line* | | 7 | 174,396 |
| 8 | Enter the **smaller** of line 6 or line 7 If the corporation must skip line 7, enter the amount from line 6 | | 8 | 122,791 |

| | | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|---|
| 9 | **Installment due dates** Enter in columns (a) through (d) the 15th day of the 4th **(Form 990 PF filers** Use 5th month), 6th, 9th, and 12th months of the corporation s tax year **Exception** Enter October 1, 2001, instead of September 15, 2001 | ► 9 | 05/15/01 | 06/15/01 | 10/01/01 | 12/15/01 |
| 10 | **Required installments** If the box on line 1 and/or line 2 above is checked, enter the amounts from Schedule A, line 40 If the box on line 3 (but not 1 or 2) is checked, see the instructions for the amounts to enter If none of these boxes are checked, enter 25% of line 8 above in each column | 10 | 23,458 | 9,132 | 40,076 | 46,302 |
| 11 | Estimated tax paid or credited for each period (see instructions) For column (a) only, enter the amount from line 11 on line 15 | 11 | 23,926 | 10,000 | 40,000 | 46,000 |
| | ***Complete lines 12 through 18 of one column before going to the next column*** | | | | | |
| 12 | Enter amount, if any, from line 18 of the preceding column | 12 | | 468 | 1,336 | 1,260 |
| 13 | Add lines 11 and 12 | 13 | | 10,468 | 41,336 | 47,260 |
| 14 | Add amounts on lines 16 and 17 of the preceding column | 14 | | | 0 | 0 |
| 15 | Subtract line 14 from line 13 If zero or less, enter 0 | 15 | 23,926 | 10,468 | 41,336 | 47,260 |
| 16 | If the amount on line 15 is zero, subtract line 13 from line 14 Otherwise, enter 0 | 16 | | 0 | 0 | |
| 17 | **Underpayment** If line 15 is less than or equal to line 10, subtract line 15 from line 10 Then go to line 12 of the next column Otherwise, go to line 18 | 17 | | | | |
| 18 | **Overpayment** If line 10 is less than line 15, subtract line 10 from line 15 Then go to line 12 of the next column | 18 | 468 | 1,336 | 1,260 | |

***Complete Part III on page 2 to figure the penalty If there are no entries on line 17, no penalty is owed***

**Part III Figuring the Penalty**

| | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|
| 19 Enter the date of payment or the 15th day of the 3rd month after the close of the tax year, whichever is earlier (see instructions) *(Form 990-PF and Form 990-T filers* Use 5th month instead of 3rd month ) | 19 | 05/14/01 | 06/13/01 | 09/13/01 | 12/11/01 |
| 20 Number of days from due date of installment on line 9 to the date shown on line 19 | 20 | | | | |
| 21 Number of days on line 20 after 4/15/2001 and before 7/1/2001 | 21 | | | | |
| 22 Underpayment on line 17 x Number of days on line 21 / 365 x 8% | 22 | | | | |
| 23 Number of days on line 20 after 6/30/2001 and before 1/1/2002 | 23 | | | | |
| 24 Underpayment on line 17 x Number of days on line 23 / 365 x 7% | 24 | | | | |
| 25 Number of days on line 20 after 12/31/2001 and before 4/1/2002 | 25 | | | | |
| 26 Underpayment on line 17 x Number of days on line 25 / 365 x 6% | 26 | | | | |
| 27 Number of days on line 20 after 3/31/2002 and before 7/1/2002 | 27 | | | | |
| 28 Underpayment on line 17 x Number of days on line 27 / 365 x ____ *% | 28 | | | | |
| 29 Number of days on line 20 after 6/30/2002 and before 10/1/2002 | 29 | | | | |
| 30 Underpayment on line 17 x Number of days on line 29 / 365 x ____ *% | 30 | | | | |
| 31 Number of days on line 20 after 9/30/2002 and before 1/1/2003 | 31 | | | | |
| 32 Underpayment on line 17 x Number of days on line 31 / 365 x ____ *% | 32 | | | | |
| 33 Number of days on line 20 after 12/31/2002 and before 2/16/2003 | 33 | | | | |
| 34 Underpayment on line 17 x Number of days on line 33 / 365 x ____ *% | 34 | | | | |
| 35 Add lines 22, 24, 26, 28, 30, 32, and 34 | 35 | | | | |
| 36 **Penalty** Add columns (a) through (d), of line 35 Enter the total here and on Form 1120, line 33, Form 1120 A, line 29, or the comparable line for other income tax returns | 36 | | | | |

***For underpayments paid after March 31, 2002** For lines 28, 30, 32, and 34, use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin To obtain this information on the Internet, access the IRS web site at **www irs gov** You can also call 1 800 829 1040 to get interest rate information

**Schedule A** **Annualized Income Installment Method and/or the Adjusted Seasonal Installment Method Under Section 6655(e)** (see instructions)

**Form 1120S filers** *For lines 2, 14, 15 and 16 below, 'taxable income' refers to excess net passive income or the amount on which tax is imposed under Section 1374(a) (or the corresponding provisions of prior law) whichever applies*

| **Part I — Annualized Income Installment Method** | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|
| 1 Annualization periods (see instructions) | 1 | First 2 months | First 3 months | First 6 months | First 9 months |
| 2 Enter taxableincome for each annualization period (see instructions) | 2 | 1,563,853 | 1,629,468 | 4,844,418 | 8,922,601 |
| 3 Annualization amounts (see instructions) | 3 | 6 00000 | 4 00000 | 2 00000 | 1 33333 |
| 4 Annualized taxable income Multiply line 2 by line 3 | 4 | 9,383,118 | 6,517,872 | 9,688,836 | 11,896,772 |
| 5 Figure the tax on the amount in each column on line 4 using the instructions for Form 1120, Schedule J, line 3 (or the comparable line of the tax return) | 5 | 93,831 | 65,179 | 96,888 | 118,968 |
| 6 Enter other taxes for each payment period (see instructions) | 6 | | | | |
| 7 Total tax Add lines 5 and 6 | 7 | 93,831 | 65,179 | 96,888 | 118,968 |
| 8 For each period, enter the same type of credits as allowed on Form 2220, lines 4 and 5c (see instructions) | 8 | | | | |
| 9 Total tax after credits Subtract line 8 from line 7 If zero or less, enter 0 | 9 | 93,831 | 65,179 | 96,888 | 118,968 |
| 10 Applicable percentage | 10 | 25% | 50% | 75% | 100% |
| 11 Multiply line 9 by line 10 | 11 | 23,458 | 32,590 | 72,666 | 118,968 |
| 12 Add the amounts in all preceding columns of line 40 (see instructions) | 12 | | 23,458 | 32,590 | 72,666 |
| 13 **Annualized income installments** Subtract line 12 from line 11 If zero or less, enter 0 | 13 | 23,458 | 9,132 | 40,076 | 46,302 |

**Part II — Adjusted Seasonal Installment Method** (Caution *Use this method only if the base period percentage for any 6 consecutive months is at least 70% See instructions for more information.*)

| | | (a) | (b) | (c) | (d) |
|---|---|---|---|---|---|
| 14 Enter taxable income for the following periods | | First 3 months | First 5 months | First 8 months | First 11 months |
| a Tax year beginning in 1998 | 14 a | | | | |
| b Tax year beginning in 1999 | 14 b | | | | |
| c Tax year beginning in 2000 | 14 c | | | | |
| 15 Enter taxable income for each period for the tax year beginning in 2001 | 15 | | | | |
| 16 Enter taxable income for the following periods | | First 4 months | First 6 months | First 9 months | Entire year |
| a Tax year beginning in 1998 | 16 a | | | | |
| b Tax year beginning in 1999 | 16 b | | | | |
| c Tax year beginning in 2000 | 16 c | | | | |
| 17 Divide the amount in each column on line 14a by the amount in column (d) on line 16a | 17 | | | | |
| 18 Divide the amount in each column on line 14b by the amount in column (d) on line 16b | 18 | | | | |
| 19 Divide the amount in each column on line 14c by the amount in column (d) on line 16c | 19 | | | | |

| | | (a) First 4 months | (b) First 6 months | (c) First 9 months | (d) Entire year |
|---|---|---|---|---|---|
| 20 Add lines 17 through 19 | 20 | | | | |
| 21 Divide line 20 by 3 | 21 | | | | |
| 22 Divide line 15 by line 21 | 22 | | | | |
| 23 Figure the tax on the amount on line 22 using the instructions for Form 1120, Schedule J, line 3 (or the comparable line of the return) | 23 | | | | |
| 24 Divide the amount in columns (a) through (c) on line 16a by the amount in column (d) on line 16a | 24 | | | | |
| 25 Divide the amount in columns (a) through (c) on line 16b by the amount in column (d) on line 16b | 25 | | | | |
| 26 Divide the amount in columns (a) through (c) on line 16c by the amount in column (d) on line 16c | 26 | | | | |
| 27 Add lines 24 through 26 | 27 | | | | |
| 28 Divide line 27 by 3 | 28 | | | | |
| 29 Multiply the amount in columns (a) through (c) of line 23 by columns (a) through (c) of line 28 In column (d), enter the amount from line 23, column (d) | 29 | | | | |
| 30 Enter other taxes for each payment period (see instructions) | 30 | | | | |
| 31 Total tax Add lines 29 and 30 | 31 | | | | |
| 32 For each period, enter the same type of credits as allowed on Form 2220, lines 4 and 5c (see instructions) | 32 | | | | |
| 33 Total tax after credits Subtract line 32 from line 31 If zero or less, enter 0 | 33 | | | | |
| 34 Add the amounts in all preceding columns of line 40 (see instructions) | 34 | | | | |
| 35 **Adjusted seasonal installments** Subtract line 34 from line 33 If zero or less, enter 0 | 35 | | | | |

## Part III – Required Installments

| | | 1st installment | 2nd installment | 3rd installment | 4th installment |
|---|---|---|---|---|---|
| 36 If only one of the above parts is completed, enter the amount in each column from line 13 or line 35 If both parts are completed, enter the **smaller** of the amounts in each column from line 13 or line 35 | 36 | 23,458 | 9,132 | 40,076 | 46,302 |
| 37 Enter 25% of line 8 on page 1 of Form 2220 in each column (**Note** *Large corporations, see the instructions for line 10 for the amounts to enter.*) | 37 | 30,698 | 30,698 | 30,698 | 30,697 |
| 38 Subtract line 40 of the preceding column from line 39 of the preceding column | 38 | | 7,240 | 28,806 | 19,428 |
| 39 Add lines 37 and 38 | 39 | 30,698 | 37,938 | 59,504 | 50,125 |
| 40 **Required installments** Enter the **smaller** of line 36 or line 39 here and on page 1 of Form 2220, line 10 | 40 | 23,458 | 9,132 | 40,076 | 46,302 |

Form 990-PF
Part IV, Line 1
Statement

# Capital Gains and Losses for Tax on Investment Income

Attach to return

2001

Name: Wexner Foundation

Employer ID No: 23-7320631

Copy Number 1 of 1

| (a) List and describe the kind(s) of property sold (e g , real estate, 2 story brick warehouse, or common stock, 200 shares MLC Company) | (b) How acquired P Purchase D Donation | (c) Date acquired (month, day, year) | (d) Date sold (month, day, year) |
|---|---|---|---|
| 1a 122,500 shares of LTD, Inc | D | 07/10/78 | 08/14/01 |
| b 77,300 shares of LTD, Inc | D | 07/10/78 | 08/13/01 |
| c 50,200 shares OF LTD, Inc | D | 07/10/78 | 08/15/01 |
| d 50,000 shares of LTD, Inc | D | 07/10/78 | 10/22/01 |
| e 40,000 shares of LTD, Inc | D | 07/10/78 | 10/23/01 |
| f 30,000 shares of LTD, Inc | D | 07/10/78 | 10/26/01 |
| g 20,000 shares of LTD, Inc | D | 07/10/78 | 11/05/01 |
| h 80,000 shares of LTD, Inc | D | 07/10/78 | 11/06/01 |
| i 65,562 shares of LTD, Inc | D | 07/10/78 | 11/07/01 |
| j 1,072 shares of LTD, Inc | D | 07/10/78 | 11/23/01 |

| | (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|---|---|---|---|---|
| a | 1,979,217 | | 0 | 1,979,217 |
| b | 1,254,060 | | 0 | 1,254,060 |
| c | 808,719 | | 0 | 808,719 |
| d | 547,639 | | 0 | 547,639 |
| e | 446,807 | | 0 | 446,807 |
| f | 348,586 | | 0 | 348,586 |
| g | 234,727 | | 0 | 234,727 |
| h | 954,913 | | 0 | 954,913 |
| i | 803,607 | | 0 | 803,607 |
| j | 13,963 | | 0 | 13,963 |

| | Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (column (h) gain minus column (k), but not less than 0 ) or losses (from column (h)) |
|---|---|---|---|---|
| | (i) Fair Market Value as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of column (i) over column (j), if any | |
| a | | | | 1,979,217 |
| b | | | | 1,254,060 |
| c | | | | 808,719 |
| d | | | | 547,639 |
| e | | | | 446,807 |
| f | | | | 348,586 |
| g | | | | 234,727 |
| h | | | | 954,913 |
| i | | | | 803,607 |
| j | | | | 13,963 |

Form 990-PF, Page 1, Part I, Line 18
**Line 18 Stmt**

| Taxes (see instructions) | Rev/Exp Book | Net Inv Inc | Adj Net Inc | Charity Disb |
|---|---|---|---|---|
| Federal Excise | 144,450 | | | 144,450 |
| Payroll Taxes | 58,887 | | | 58,887 |
| Total | 203,337 | | | 203,337 |

Form 990 PF, Page 1, Part I, Line 23
**Line 23 Stmt**

| Other expenses | Rev/Exp Book | Net Inv Inc | Adj Net Inc | Charity Disb |
|---|---|---|---|---|
| Insurance | 5,082 | | | 5,082 |
| Repairs & Maintenance | 20,609 | | | 20,609 |
| Office Supplies Postage&Misc | 38,978 | | | 38,978 |
| Delivery & Security | 18,209 | | | 18,209 |
| Personnal Procurement | 8,200 | | | 8,200 |
| Dues and Subscriptions | 5 | | | 5 |
| Bank Charges | 598 | | | 598 |
| Honoraria | 299,972 | | | 299,972 |
| Total | 391,653 | | | 391,653 |

Form 990-PF, Page 1, Part I, Line 16a
**L-16a Stmt**

| **Line 16a - Legal Fees** Name of Provider | Type of Service Provided | Amount Paid |
|---|---|---|
| Vorys, Sater, Seymour&Pease | Pension Consultation | 3,431 |
| Total | | 3,431 |

Form 990 PF, Page 1, Part I, Line 16b
**L-16b Stmt**

| **Line 16b - Accounting Fees** *Name of Provider* | *Type of Service Provided* | *Amount Paid* |
|---|---|---|
| PricewaterhouseCoopers | Financial Statement & Tax Preparation | 20,376 |
| Eli Jaffe, CPA | Financial Analysis | 7,745 |
| Total | | 28,121 |

Form 990 PF, Page 1, Part I, Line 16c
**L-16c Stmt**

| **Line 16c - Other Professional Fees** Name of Provider | Type of Service Provided | Amount Paid |
|---|---|---|
| ADP | Payroll Processing | 2,511 |
| Berman Consulting | Computer Consulting | 5,975 |

Form 990 PF, Page 1, Part I, Line 16c Continued
**L-16c Stmt**

| Line 16c - Other Professional Fees<br>*Name of Provider* | Type of Service Provided | Amount Paid |
|---|---|---|
| Total | | 8,486 |

Form 990 PF, Page 2, Part II, Line 10b
**L-10b Stmt**

| Line 10b - Investments - Corporate Stock | End of Year<br>Book Value | End of Year<br>Fair Market Value |
|---|---|---|
| Limited Inc ,Common Stock | 0 | 0 |
| Abercrombie&Fitch,Common Stock | 0 | 0 |
| Too Inc , Common Stock | 0 | 0 |
| Total | 0 | 0 |

Form 990 PF, Page 6, Part VIII, Compensation
**Part VIII, Line 1 Stmt**

| (a)<br>Name and address | (b)<br>Title, and *average hours* per week devoted to position | (c)<br>Compensation **(If not paid, enter -0-)** | (d)<br>Contributions *to employee* benefit plans and deferred compensation | (e)<br>Expense *account, other* allowances |
|---|---|---|---|---|
| Jeffrey Epstein<br>6100 Red Hook Qtrs St Thomas USVI | Trustee<br>As Required | 0 | 0 | 0 |
| Larry S Moses<br>300 S Drexel Ave Cols Oh 43209 | President<br>40 hours | 281,000 | 10,500 | 0 |
| Total | | 281,000 | 10,500 | 0 |

The Wexner Foundation
23-7320631
FY 12-31-2001

| Page 10, Part XVI, Line 3a-Grants | Date | | | Purpose |
|---|---|---|---|---|
| Wexner Heritage Foundation<br>6525 W Campus Oval<br>New Albany, Ohio 43054<br>(501(c)3 Organization) | 3-15-01 | Cash | 250,000 | To fund educational seminars |
| | 3-29-01 | Cash | 250,000 | " |
| | 5-14-01 | Cash | 250 000 | " " |
| | 5-31-01 | Cash | 250,000 | " " |
| | 6-22-01 | Cash | 250 000 | " |
| | 7-12-01 | Cash | 250,000 | " |
| | 7-17-01 | Cash | 250,000 | " " |
| | 8-2-01 | Cash | 275,000 | " |
| | 8-7-01 | Cash | 250,000 | " " |
| | 9-11-01 | Cash | 250,000 | " |
| | 10-24-01 | Cash | 100,000 | " " |
| | 10-31-01 | Cash | 100,000 | " |
| | 11-15-01 | Cash | 250,000 | " |
| | 12-12-01 | Cash | 100,000 | " |
| The Columbus Torah Academy<br>181 Noe-Bixby Road<br>Columbus,Ohio 43213<br>(501(c)3 Organization) | 4-30-01 | Cash | 50,000 | To provide educational funding |
| Solomon Schechter School of Manhattan<br>50 E 87th Street<br>New York, New York 10128<br>(501(c)3 Organization) | 2-21-01 | Cash | 25,000 | To provide educational funding |
| United Way Of Franklin County<br>360 S Third St<br>Columbus Ohio 43215<br>(501(c)3 Organization) | 11-28-01 | Cash | 1 179 | To fund community assistance programs |
| Wexner Heritage Village<br>1151 College Avenue<br>Columbus, Ohio 43209<br>(501(c)3 Organization) | 9-12-01 | Cash | 27,000 | To fund community assistance programs |
| The Columbus Jewish Day School<br>5419 E Broad St<br>Columbus, Ohio 43213<br>(501(c)3 Organization) | 3-12-01 | Cash | 83,334 | To provide educational funding |
| | 4-12-01 | Cash | 43,500 | To provide educational funding |
| Hillel,The Foundation for Jewish Campus Life<br>1640 Rhode Island Ave ,NW<br>Washington, DC 20036<br>(501(c)3 Organization) | 9-5-01 | Cash | 125 000 | To provide educational funding |
| | 10-29-01 | Cash | 50,000 | To provide educational funding |
| Hillel at The Ohio State University<br>46 E 16th Ave<br>Columbus, Oh 43201<br>(501(c)3 Organization) | 5-17-01 | Cash | 125 000 | To provide educational funding |
| American Friends of Tel Aviv University<br>39 Broadway, 15th Floor<br>New York, NY 10006<br>(501(c)3 Organization) | 12-20-01 | Cash | 25 000 | To provide educational funding |
| Birthright Israel North America<br>111 8th Ave , Suite 11E<br>New York, NY 10011<br>(501(c)3 Organization) | 1-11-01 | Cash | 500,000 | To provide educational funding |
| | 5-31-01 | Cash | 500,000 | To provide educational funding |
| American Friends of the Hebrew University<br>11 E 69th St<br>New York New YorK 10021<br>(501(c)3 Organization) | 12-20-01 | Cash | 50,000 | To provide educational funding |

| | | | | |
|---|---|---|---|---|
| Leo Yassenoff Community Center<br>1125 College Ave<br>Columbus Ohio 43209<br>(501(c)3 Organization) | 12-20-01 | Cash | 8,334 | To fund community assistance programs |
| Columbus Jewish Foundation<br>1175 College Ave<br>Columbus Ohio 43209<br>(501(c)3 Organization) | 6-21-01 | Cash | 16,667 | To fund community assistance programs |
| Columbus Jewish Federation<br>1175 College Ave<br>Columbus, Ohio 43209<br>(501(c)3 Organization) | 8-30-01 | Cash | 2,200,000 | To fund community assistance programs |
| Jewish Theological Seminary<br>Broadway And 122nd St<br>New York,New York 10027<br>(501(c)3 Organization) | 12-20-01 | Cash | 5,000 | To provide educational funding |
| The Schottenstein Chabad House<br>207 E 15th Ave<br>Columbus Ohio 43201<br>(501(c)3 Organization) | 6-26-01 | Cash | 2,500 | To provide educational funding |
| American Friends of the Peres Center for Peace<br>30 Rockefeller Plaza, 41st Floor<br>New York,NY 10012<br>(501(c)3 Organization) | 3-29-01 | Cash | 125 000 | To provide educational funding |
| The Jewish Education Service of North America<br>111 Eighth Avenue 11th Floor<br>New York, New York 10011-5201<br>(501(c)3 Organization) | 4-11-01 | Cash | 20 000 | To provide educational funding |
| Fellowships-Paid During Calendar Year<br>Hebrew Union College<br>3101 Clifton Ave<br>Cincinnati,Ohio 45220<br>(501(c)3 Organization) | | Cash | 276,742 | To fund educational fellowships |
| Yeshiva University<br>500 W 185th St<br>New York, New York 10033<br>(501(c)3 Organization) | | Cash | 106,250 | To fund educational fellowships |
| Jewish Theological Seminary<br>Broadway And 122nd St<br>New York,New York 10027<br>(501(c)3 Organization) | | Cash | 544 953 | To fund educational fellowships |
| Stanford University<br>Stanford, CA 94305<br>(501(c)3 Organization) | | Cash | 58,046 | To fund educational fellowships |
| Yeshivat Chovevei Torah Rbbinical School<br>550W 110th St<br>New York,New York 10025<br>(501(c)3 Organization) | | Cash | 40,000 | To fund educational fellowships |
| Columbia University<br>210 Kent Hall<br>New York,New York 10025<br>(501(c)3 Organization) | | Cash | 190,109 | To fund educational fellowships |
| Hebrew University of Jerusalem<br>11th East 69th ST<br>New York, New York 10021<br>(501(c)3 Organization) | | Cash | 990 | To fund educational fellowships |
| CUNY Graduate School<br>33 W 42nd St<br>New Yorl, NY 10036<br>(501(c)3 Organization) | | Cash | 9,960 | To fund educational fellowships |

| | | | | |
|---|---|---|---|---|
| Brandeis University<br>415 South Street<br>Waltham,Mass 02254<br>(501(c)3 Organization) | | Cash | 14,575 | To fund educational fellowships |
| Reconstructionist Rabbinical College<br>Church Road & Greenwood Avenue<br>Wyncote,Pa 19095<br>(501(c)3 Organization) | | Cash | 82 050 | To fund educational fellowships |
| Harvard University<br>Cambridge,Mass 02138<br>(501(c)3 Organization) | | Cash | 820 268 | To fund educational fellowships |
| New York University<br>100 Washington Square East<br>New York, New York 10003<br>(501(c)3 Organization) | | Cash | 40,054 | To fund educational fellowship |
| Yale University<br>PO Box 208232<br>New Haven, CT 06520<br>(501(c)3 Organization) | | Cash | 70,950 | To fund educational fellowship |
| Pardes Institute<br>PO Box 8575<br>Jerusalem 91084<br>(501(c)3 Organization) | | Cash | 6,000 | To fund educational fellowship |
| University of Pennsylvania<br>3451 Walnut Street<br>Philadelphia, Pa 19104<br>(501(c)3 Organization) | | Cash | 46,698 | To fund educational fellowship |
| University of California<br>461 University Hall<br>Berkeley, Ca 94720<br>(501(c)3 Organization) | | Cash | 15 788 | To fund educational fellowship |
| University of Chicago<br>Chicago, Il 60637<br>(501(c)3 Organization) | | Cash | 24,805 | To fund educational fellowship |
| University of Judaism<br>15600 Mulholland Dr<br>Los Angeles, Ca 90077<br>(501(c)3 Organization) | | Cash | 15,000 | To fund educational fellowship |
| Rabbinic College of America<br>226 Sussex Ave , PO Box 1996<br>Morristown NJ 07962<br>(501(c)3 Organization) | | Cash | 13,500 | To fund educational fellowship |
| Drisha Institute for Jewish Education<br>131 W 86th St<br>New York New York 10024<br>(501(c)3 Organization) | | Cash | 8,000 | To fund educational fellowship |
| Northwestern University<br>619 Clark St<br>Evanston, Il 60208<br>(501(c)3 Organization) | | Cash | 19,118 | To fund educational fellowship |
| Union Theological Seminary<br>3041 Broadway at Reinhold Niebuhr Place<br>Ny, Ny 10027<br>(501(c)3 Organization) | | Cash | 700 | To fund educational fellowship |
| Living Stipend-Paid Directly To Fellow Per U of Penn Policy<br>Moshe Simon<br>12 Rosegarden Circle, Apt 2<br>Brighton, Ma 02135 | 3-26-01 | Cash | 5,833 | To fund educational fellowship |

| | | | | |
|---|---|---|---|---|
| Living Stipend-Paid Directly To Fellow Per Columbia Policy | | | | |
| Warren Bass | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 504 W 110th St ,#1F | | | | |
| New York New York 10025 | | | | |
| Living Stipends-Paid Directly To Fellow Per Stanford Policy | | | | |
| Mara Benjamin | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 116C Escondido Village | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Stanford, Ca 94305 | | | | |
| Living Stipends-Paid Directly To Fellow Per NYU Policy | | | | |
| Lisa Schlaff | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 106 W 96th #3B | | | | |
| New York, New York 10025 | | | | |
| Living Stipends-Paid Directly To Fellow Per Stanford Policy | | | | |
| Jon Levisohn | 3-26-01 | Cash | 7 833 | To fund educational fellowship |
| 73C Escondido Village | | | | |
| Stanford, Ca 94305 | | | | |
| Living Stipends-Paid Directly To Fellow Per Columbia Policy | | | | |
| Deena Aranoff | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 49 W 85th St Apt 3C | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| New York, New York 10024 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Yale Policy | | | | |
| Noam Pianko | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 562 Kendall Ave , Apt 32 | 9-5-01 | Cash | 6 250 | To fund educational fellowship |
| Palo Alto, Ca 94306 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Columbia Policy | | | | |
| James Loeffler | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 100 W 105th Street,Apt PH4 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| New York, NY 10025 | | | | |
| Living Stipends-Paid Directly To Fellow Per Rabbinical College of America Policy | | | | |
| Joseph Kanofsky | 2-21-01 | Cash | 1,333 | To fund educational fellowship |
| 31 Tikvah Way | 3-26-01 | Cash | 7,833 | To fund educational fellowship |
| Morristown, NJ 07960 | 9-5-01 | Cash | 9 500 | To fund educational fellowship |
| | 11-28-01 | Cash | 4,750 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Columbia Policy | | | | |
| Benjamin Jacobs | 3-26-01 | Cash | 5 833 | To fund educational fellowship |
| 236 Cumberland St Apt #1 | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| Brooklyn, New York 11205 | 11-28-01 | Cash | 6 250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Stanford Policy | | | | |
| Sarah Benor | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| Barnes 88,Escondido Village | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| Stanford, Ca 94305 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Brandeis Policy | | | | |
| Rachel Kest | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 66 Springfield St Apt #2 | | | | |
| Somerville, Ma 02143 | | | | |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Shana Komitee | 8-14-01 | Cash | 6,250 | To fund educational fellowship |
| 123 Oxford St Apt #13 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Cambridge, Ma 02140 | | | | |
| Living Stipends-Paid Directly To Fellow Per Yale Policy | | | | |
| Joshua Chadajo | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 15 Margery Road #2 | 8-13-01 | Cash | 6,250 | To fund educational fellowship |
| Brockton, Ma 02301 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Yale Policy | | | | |
| Lila Corwin | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 479 Orange St Apt 1 | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| New Haven, CT 06511 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |

| | | | | |
|---|---|---|---|---|
| Living Stipends-Paid Directly To Fellow Per Columbia Policy | | | | |
| Shira Epstein | 3-26-01 | Cash | 5 833 | To fund educational fellowship |
| 254 W 98th St #3c | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| New York, New York 10025 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per U of Penn Policy | | | | |
| Tammy Jacobowitz | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 1726 Pine St Apt 2F | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| Philadelphia, Pa 19103 | 11-29-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipend-Paid Directly To Fellow Per Columbia Policy | | | | |
| Shira Reifman | 3-26-01 | Cash | 6,833 | To fund educational fellowship |
| 3640 Johnson Ave , Apt 3E | 9-5-01 | Cash | 7,333 | To fund educational fellowship |
| Bronx, NY 10463 | 11-28-01 | Cash | 7,333 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Yale Policy | | | | |
| Tracy Sivitz | 3-26-01 | Cash | 8,833 | To fund educational fellowship |
| 200 E 94th St , Apt1014 | 7-9-01 | Cash | 500 | To fund educational fellowship |
| New York New York 10128 | 9-5-01 | Cash | 9,500 | To fund educational fellowship |
| | 11-28-01 | Cash | 9,500 | To fund educational fellowship |
| Living Stipend-Paid Directly To Fellow Per Columbia Policy | | | | |
| Rachel Alexander | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 501 West 123rd St Apt 3E | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| New York Ny 10027 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per NYU Policy | | | | |
| Wendy Amsellem | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 740 West End Ave Apt 91 | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| New York, NY 10025 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per UC-Berkeley Policy | | | | |
| Naomi Brenner | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 1726 Parker St | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| Berkeley, Ca 94703 | 11-28-01 | Cash | 6 250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per UofChicago Policy | | | | |
| Jane Kanarek | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 3720 1/2 N Pine Grove Apt 3E | 9-5-01 | Cash | 6 250 | To fund educational fellowship |
| Chicago, Il 60613 | 11-28-01 | Cash | 6 250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per UC-Berkeley Policy | | | | |
| Faye Lederman | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 2909 1/2 Martin Luther Way | 9-5-01 | Cash | 6 250 | To fund educational fellowship |
| Berkeley, Ca 94703 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Sacha Litman | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 12 Newport Rd #BSMT | 8-14-01 | Cash | 6,250 | To fund educational fellowship |
| Cambridge,MA 02140 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipend-Paid Directly To Fellow Per Columbia Policy | | | | |
| Andrea Siegle | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 191 Claremont Ave | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| New York, Ny 10027 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per U of Judaism Policy | | | | |
| Julie Pelc | 3 26-01 | Cash | 5 833 | To fund educational fellowship |
| 1455 S Wooster St 14 | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| Los Angeles, Ca 90035 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per Stanford Policy | | | | |
| Miriam Heller-Stern | 3-26-01 | Cash | 5,833 | To fund educational fellowship |
| 21329 Oxford St | 9 5-01 | Cash | 6,250 | To fund educational fellowship |
| Berkeley, Ca 94709 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Living Stipends-Paid Directly To Fellow Per JTS Policy | | | | |
| Dina Gerber Huebner | 9-5-01 | Cash | 9,500 | To fund educational fellowship |
| 250 E 87th St Apt 14A | 11-28-01 | Cash | 9,500 | To fund educational fellowship |
| NY,NY 10128 | | | | |

| | | | | |
|---|---|---|---|---|
| Living Stipends-Paid Directly To Fellow Per Drisha Policy | | | | |
| Jane Rachel Schonbrun | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 521 W 122nd St, Apt 24 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| NY, NY 10027 | | | | |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Aviva Sufian | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 15 Ware St #2 | 11-28-01 | Cash | 6 250 | To fund educational fellowship |
| Cambridge Ma 02138 | | | | |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Allison Cook | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 58 Chilton St #3 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Cambridge, Ma 02138 | | | | |
| Living Stipends-Paid Directly To Fellow Per Branders Policy | | | | |
| Beth Cousens | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 8 Leonard St #3 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Cambridge Ma 02139 | | | | |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Aaron Dorfman | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 76 Winchester St #3 | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Medford Ma 02155 | | | | |
| Living Stipends-Paid Directly To Fellow Per Yeshivat Chovevei Policy | | | | |
| Marc Gitler | 9-5-01 | Cash | 6 250 | To fund educational fellowship |
| 384 Warwick Ave | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Teaneck,NJ 07666 | | | | |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Batya Orit Kent | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 73 Boyd St | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Watertown, Ma 02472 | | | | |
| Living Stipends-Paid Directly To Fellow Per U of Pennsylvania Policy | | | | |
| Aaron Koller | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 196-29 Dunton Ave ,Apt 1C | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Holliswood, Ny 11423 | | | | |
| Living Stipends-Paid Directly To Fellow Per Harvard Policy | | | | |
| Rachel Neis | 9-5-01 | Cash | 6,250 | To fund educational fellowship |
| 16 Francis Ave | 11-28-01 | Cash | 6,250 | To fund educational fellowship |
| Cambridge, Ma 02138 | | | | |
| | Total Grants Paid | | 10,047,144 | |

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM

## A PROGRAM OF THE WEXNER FOUNDATION

6525 WEST CAMPUS OVAL, SUITE 110, NEW ALBANY, OHIO 43054 • 614/939-6060

The goal of the Wexner Foundation is to be a source of enduring benefit to humankind, with a special commitment toward strengthening Jewish life in North America, Israel and throughout the world The priority of the Foundation is the enhancement and improvement of Jewish leadership

The career areas designated for Wexner Graduate Fellows are

- CANTORATE
- JEWISH COMMUNAL SERVICE
- JEWISH EDUCATION
- JEWISH STUDIES
- RABBINATE

The Wexner Graduate Fellowship Program is designed to attract and support the most promising and talented Jewish men and women to pursue careers in professional Jewish leadership, to provide the best possible context for them to engage in professional graduate training, to enable them to interact extensively with outstanding Jewish leaders and with one another, and ultimately, to enhance the attraction of these careers of Jewish service, which are so vital to today's Jewish community

## AWARDS

Wexner Graduate Fellowships cover all tuition expenses and required fees plus a generous living stipend, the amount and terms of which are set in advance of each academic year

Fellowships are granted for a two-year period and may be renewed for a one- or two-year term by the Graduate Fellowship Committee Each year of funding is contingent upon evidence of satisfactory academic achievement

Fellows are required to engage in full-time graduate study

It is the purpose of this program to provide a context for graduate study that is free from distraction Therefore, Wexner Fellows may engage in independent employment during the academic year only with the permission of the Director

Fellows are required to participate in special programs held during the course of the year and annual interdisciplinary institutes sponsored by the Foundation The purposes of these programs are to create a cohesive fellowship community and to impact upon the leadership and skill development of each Fellow

Wexner Graduate Fellows are afforded unique opportunities for ongoing interaction with outstanding Jewish leaders and for extensive interchange with each other Fellows participate in an experience intended to be of enduring benefit

## ELIGIBILITY

Fellowships are awarded to North Americans who are college graduates and who plan to enter a qualifying graduate program Wexner Graduate Fellowships are limited to those who have not yet begun their professional training Applicants with graduate work in a different field, who wish to move into one of the above areas, are also eligible Only individuals who plan to pursue a career in the North American Jewish community are eligible to apply to this program

Awards are given to outstanding candidates who have a strong personal commitment to the Jewish community, who have demonstrated excellence in academic achievement, and who possess the potential to provide outstanding professional leadership that will shape the future of Jewish communal life in North America

SEE OTHER SIDE FOR MORE INFORMATION

## Application Guidelines

*All are encouraged to apply, irrespective of denominational affiliation, gender, racial or ethnic origin, disability or sexual orientation Please note the Wexner Graduate Fellowship Program honors the admissions policies of participating educational institutions*

Applicants to the Wexner Graduate Fellowship Program are required to submit

- ☐ 1 Four (4) completed application forms, the original and three copies, including four (4) copies/reprints of a recent color photograph Please use only the space provided Do not attach a personal resume or curriculum vitae

- ☐ 2 Two original essays in response to questions on the provided forms Please note that each essay should be 2 double-spaced pages using no less than a 12-point font The fellowship committee will only review essays which meet these specifications Essays should be submitted on the attached forms, with three copies in addition to the original *Because the Wexner Graduate Fellowship Committee wishes to become acquainted with applicants in significant depth, these essays are of particular importance*

- ☐ 3 Academic transcripts (undergraduate and, if applicable, graduate) Transcripts must be forwarded to the applicant in sealed envelopes stamped with the college or university seal, photocopies are unacceptable

- ☐ 4 Scores on the General Test of the Graduate Record Examination (Institution #3134) The exam should be taken no later than January, unless otherwise arranged with the Director of the program

- ☐ 5 Three letters of recommendation (forms attached), with at least one from an academic instructor who has worked closely with the applicant and one from an employment supervisor who is well-acquainted with the applicant and his or her work experience

- ☐ 6 An acceptance letter (or confirmation of application) from the graduate institution(s) the applicant intends to attend Please note that fellowships will not be formalized until there is official evidence that the applicant has been accepted into the program designated for his or her career preparation

**Please Note**

**Applicants should collect all supporting materials, with the exception of GRE scores, and submit them to the Foundation in one packet, including the completed application form, essays and all additional copies as required above Applicants should instruct their referees to send their letters directly to them in a sealed envelope, with the referee's signature across the back flap. It is the responsibility of the applicant to allow sufficient time when requesting supporting materials to assure the timely submission of the complete application.**

## Application Deadline

Application materials must be completed in full and submitted to the Wexner Foundation Graduate Fellowship Program office by **February 1** Return completed applications to

Director, Graduate Fellowship Program
The Wexner Foundation
6525 West Campus Oval, Suite 110
New Albany, OH 43054
(614) 939-6060

## Selection of Fellows

finalists are required to participate in personal interviews, at the Foundation's expense Awards are announced in May for the ensuing academic year

The selection of Fellows is made by the Wexner Graduate Fellowship Committee, which is composed of leading academicians and professionals who are committed to the fields encompassed by the program

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM
## OFFICIAL APPLICATION

Please attach color photo here

**Please type or print in black ink only.**
**Please use this form only; no attachments.**

## GENERAL INFORMATION

Name _____ Social Security Number _____

Date of Birth _____ Place of Birth _____

Citizenship _____ E-mail Address _____

Mailing Address/Telephone

_____

_____

_____

_____

Alternate Address/Telephone (if relevant)

_____

_____

_____

_____

**PLEASE INDICATE YOUR CHOSEN PROFESSIONAL CAREER AREA. (Check one only)**

☐ CANTORATE ☐ JEWISH COMMUNAL SERVICE ☐ JEWISH EDUCATION ☐ JEWISH STUDIES ☐ RABBINATE

List the specific graduate programs and academic institutions to which you have applied to prepare for your professional career Also indicate the application date and the projected enrollment date for each program

| GRADUATE PROGRAM/INSTITUTION | APPLICATION DATE | PROJECTED ENROLLMENT DATE |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

Rate in order of priority, from 1 (highest) to 7 (less important), which of the following influences have been most decisive in your decision to pursue a professional career in the Jewish community

___Family ___Mentors ___Professional Role Models ___Undergraduate Experiences ___Peers

___Teachers ___Other (please specify)_____

How did you learn about the Wexner Graduate Fellowship Program?

_____

Do you know any Wexner Graduate Fellows? If so, please list their names _____

_____

## General Education

1 Colleges/Universities (list all undergraduate and graduate schools attended)

| School | Location | Dates Attended | Major Areas of Study | Diploma/Degree Granted | Date |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

2 List academic awards, honors, scholarships, and distinctions you have attained, as well as any publications you have authored

3 Have you been suspended or dismissed from any academic institution? If yes, please explain

4 Many applicants engage in a variety of activities and work experiences after receiving their undergraduate or graduate degrees. If you have not been enrolled in an institution of higher learning in the past year(s), please briefly describe your activities since you were last enrolled

5 In which foreign languages (other than Hebrew) are you proficient? Please rate yourself in the following categories as excellent, good, fair or poor

| anguage | Reading Comprehension | Speaking | Writing | Translation |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

## JEWISH EDUCATION

1 Elementary and Secondary

| SCHOOL | AFFILIATION | LOCATION | TYPE OF PROGRAM | DATES ATTENDED |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

2 List informal Jewish educational activities, including summer camps, youth groups, Israel trips or other programs in which you have participated

| ORGANIZATION | LOCATION | TYPE OF PROGRAM | YOUR ROLE | DATES OF PARTICIPATION |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

3 List university level courses in Jewish Studies

| SCHOOL | LOCATION | COURSE DESCRIPTION | INSTRUCTOR | CREDIT UNITS |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

4 Please list all formal Hebrew language study you have completed

Rate your Hebrew skill level (excellent, good, weak, none) in the following areas

Reading Comprehension _____ Speaking _____ Writing (with comprehension) _____

5 List any academic awards, honors, scholarships and distinctions you have attained in your Jewish education as well as any related publications you have authored

## EMPLOYMENT HISTORY

1 Please list all work experience in the Jewish community (including teaching, camp counseling, etc )

| PLACE/SUPERVISOR | LOCATION | TITLE/POSITION | NATURE OF WORK | DATES |
|---|---|---|---|---|

2 *Please list any other full or part-time professional work experience*

| PLACE/SUPERVISOR | LOCATION | TITLE/POSITION | NATURE OF WORK | DATES |
|---|---|---|---|---|

## Extra-Curricular Activities and Interests

1 List and briefly describe your campus-related extra-curricular activities, including positions of leadership

2 List and briefly describe your Jewish volunteer and other activities in the larger community

3 *Describe your hobbies and leisure-time interests*

## ADDITIONAL INFORMATION

1 Name of University attended _____

2 Cumulative Undergraduate Grade Point Average _____

3 Your Graduate Record Examination (GRE) scores

_____ / _____ / _____ Exam Date _____
Verbal Quantitative Analytical

Applications will not be considered complete until GPA and GRE scores are verified through official records It is the responsibility of the applicant to assure that these documents are submitted to the Foundation by February 1 The Foundation's institution number for the GRE is #3134

## REFERENCES

Provide the names, titles, addresses and telephone numbers of the three individuals who will submit letters of recommendation on your behalf (Kindly be reminded that at least one is to be from an academic instructor who has worked closely with you and one from an employment supervisor who is well acquainted with your work experience )

1 _____ _____
NAME/TITLE TELEPHONE NUMBER

_____
ADDRESS

2 _____ _____
NAME/TITLE TELEPHONE NUMBER

_____
ADDRESS

3 _____ _____
NAME/TITLE TELEPHONE NUMBER

_____
ADDRESS

Applicants should instruct each referee to send his or her letter directly to them in a sealed envelope, with the referee's signature across the back flap It is the responsibility of the applicant to collect these letters in advance of the February 1 deadline for timely submission to the Foundation

_____ _____
SIGNATURE OF APPLICANT DATE

**Submit this application along with three additional copies no later that February 1**

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM

pg 17

## ESSAY A

***Only this form should be used for the final draft of your essay Please adhere to our essay guidelines which require that each essay be typed on this form and double spaced using no less than a 12-point font and staying within the provided margins The Fellowship Committee will only review essays which meet these specifications***

APPLICANT'S NAME _____

The Wexner Graduate Fellowship Committee is vitally interested in understanding your career goals and how your projected graduate program will best prepare you for these goals Inevitably, candidates will be assessed in comparison to others with similar career interests In view of this, please describe as fully as possible

1 The development of your interest in your projected career, particularly the critical junctures that played an important role in this evolution (e g Jewish experiences, family influences, role models, ideas)

2 The leadership roles you see yourself playing in your chosen career area ten years from today

APPLICANT'S NAME _____

**ESSAY A** (CONTINUED)

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM

pg 19

## ESSAY B

***Only this form should be used for the final draft of your essay. Please adhere to our essay guidelines which require that each essay be typed on this form and double spaced using no less than a 12-point font and staying within the provided margins The Fellowship Committee will only review essays which meet these specifications.***

Applicant's Name _____

The Wexner Graduate Fellowship Program is intended to facilitate the development of future professional leaders for the North American Jewish community We are interested in your reflections on leadership in general, and your sense of yourself as a future leader

1 What leadership skills do you take to be most critical to your own development as you prepare yourself for your designated career?

2 Why did you select your specific graduate program(s) and how do you anticipate your graduate program(s) will address the leadership development needs articulated above?

3 If selected to be a Wexner Graduate Fellow, how might the fellowship experience contribute to your development as a professional leader?

py 2 ✓

APPLICANT'S NAME _____

**ESSAY B** (CONTINUED)

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM: LETTER OF RECOMMENDATION

**APPLICANT** _____
LAST NAME FIRST MIDDLE

## WAIVER:

If you wish to relinquish your right to see this letter, sign the waiver below Your referee should be instructed to return his or her letter to you in a sealed envelope, with their signature across the back flap Present this form to the referee with a self-addressed, stamped envelope You must receive each referee's letter sufficiently in advance of February 1 to allow you to submit your completed application by that date

**I waive my right to have access to or to see this letter of recommendation**

_____ _____
SIGNATURE OF APPLICANT DATE

## REFEREE:

NAME _____

TITLE/POSITION _____

ADDRESS _____

_____

_____

TELEPHONE (OFFICE) _____ (HOME) _____

## PLEASE NOTE:

**The deadline for fellowship application is February 1 This letter of recommendation should be returned directly to the applicant before the deadline. A letter of reference will be accepted by the Foundation only if it is enclosed in a sealed envelope with the referee's signature across the back flap.**

**DEAR REFEREE:**

The Wexner Graduate Fellowship Program is designed to attract promising Jewish men and women preparing for careers in professional Jewish leadership The career areas designated for Wexner Graduate Fellows are the Cantorate, Jewish Communal Service, Jewish Education, Jewish Studies and the Rabbinate Fellows are provided with full tuition and generous stipends for full time graduate study for as many as four years

We seek outstanding individuals who clearly demonstrate the promise to become leaders within their chosen fields A hallmark of the fellowship experience is two annual institutes sponsored by the Foundation Thus we seek fellows who can contribute to a respectful and creative community dialogue across the spectrum of professions and Jewish ideologies

The Wexner Foundation is grateful for your candid assessment of the applicant named below Please describe, using specific examples whenever possible, the applicant's qualifications and potential in light of these standards and expectations

*If you are not able to complete this letter of recommendation, please inform the applicant right away The applicant's eligibility may be affected if the required materials are not received by February 1*

NAME OF APPLICANT _____
LAST FIRST MIDDLE

Please type your recommendation and return it to the applicant in a sealed envelope with your signature across the back flap If you prefer to use your own stationary, please attach your letter of recommendation to this form Please limit your recommendation to a one sided single-spaced typed page responding to the three questions below

1 In what capacity and for how long have you known the applicant?

2 The Wexner Graduate Fellowship Committee is seeking candidates who have demonstrated superior intellectual ability, a capacity to work effectively with others, strong communication skills, exemplary character and integrity, a high degree of self-awareness, extensive Jewish involvement and commitment and leadership accomplishments in their activities to date

Please assess the applicant with respect to these qualities and his or her career interests, describing areas in which the applicant is particularly strong

3 While we are most interested in the candidate's strengths, some sense of areas that require growth and improvement would be useful We would appreciate your candor in this regard

CONTINUE ON REVERSE SIDE

SIGNATURE OF REFEREE

DATE

*PLEASE RETURN YOUR RECOMMENDATION TO THE APPLICANT IN A SEALED ENVELOPE SIGNING YOUR NAME ACROSS THE BACK FLAP*

**THANK YOU FOR YOUR ASSISTANCE**

The Wexner Foundation
6525 West Campus Oval, Suite 110
New Albany, Ohio 43054

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM: LETTER OF RECOMMENDATION

**APPLICANT** _____
LAST NAME FIRST MIDDLE

## WAIVER:

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**I waive my right to have access to or to see this letter of recommendation**

_____ _____
SIGNATURE OF APPLICANT DATE

## REFEREE:

NAME _____

TITLE/POSITION _____

ADDRESS _____

_____

_____

TELEPHONE (OFFICE) _____ (HOME) _____

## PLEASE NOTE:

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LAST FIRST MIDDLE

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CONTINUE ON REVERSE SIDE

SIGNATURE OF REFEREE

DATE

*PLEASE RETURN YOUR RECOMMENDATION TO THE APPLICANT IN A SEALED ENVELOPE SIGNING YOUR NAME ACROSS THE BACK FLAP*

**THANK YOU FOR YOUR ASSISTANCE**

The Wexner Foundation
6525 West Campus Oval, Suite 110
New Albany, Ohio 43054

# THE WEXNER GRADUATE FELLOWSHIP PROGRAM: LETTER OF RECOMMENDATION

**APPLICANT** _____
LAST NAME FIRST MIDDLE

## WAIVER:

*If you wish to relinquish your right to see this letter, sign the waiver below* Your referee should be instructed to return his or her letter to you in a sealed envelope, with their signature across the back flap Present this form to the referee with a self-addressed, stamped envelope You must receive each referee's letter sufficiently in advance of February 1 to allow you to submit your completed application by that date

**I waive my right to have access to or to see this letter of recommendation**

_____ _____
SIGNATURE OF APPLICANT DATE

## REFEREE:

NAME _____

TITLE/POSITION _____

ADDRESS _____

_____

_____

TELEPHONE (OFFICE) _____ (HOME) _____

## PLEASE NOTE:

**The deadline for fellowship application is February 1 This letter of recommendation should be returned directly to the applicant before the deadline A letter of reference will be accepted by the Foundation only if it is enclosed in a sealed envelope with the referee's signature across the back flap**

## DEAR REFEREE:

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*If you are not able to complete this letter of recommendation, please inform the applicant right away The applicant's eligibility may be affected if the required materials are not received by February 1*

NAME OF APPLICANT, _____
LAST FIRST MIDDLE

Please type your recommendation and return it to the applicant in a sealed envelope with your signature across the back flap If you prefer to use your own stationary, please attach your letter of recommendation to this form Please limit your recommendation to a one sided single-spaced typed page responding to the three questions below

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Please assess the applicant with respect to these qualities and his or her career interests, describing areas in which the applicant is particularly strong

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CONTINUE ON REVERSE SIDE

pg 29

SIGNATURE OF REFEREE

DATE

*PLEASE RETURN YOUR RECOMMENDATION TO THE APPLICANT IN A SEALED ENVELOPE SIGNING YOUR NAME ACROSS THE BACK FLAP*

**THANK YOU FOR YOUR ASSISTANCE**

The Wexner Foundation
6525 West Campus Oval, Suite 110
New Albany, Ohio 43054

# THE WEXNER-ISRAEL FELLOWSHIP PROGRAM

## ■ THE WEXNER-ISRAEL FELLOWSHIP PROGRAM

The Wexner-Israel Fellowship Program was established in 1989 by The Wexner Foundation and Harvard University to enable up to ten outstanding Israeli government officials to study for a Masters Degree at the University's John F Kennedy School of Government each year The goal of the program is to provide Israel's next generation of leaders with advanced public management training Through the Kennedy School's faculty, curriculum, students, and research centers, the Wexner-Israel fellows will have a rich environment for reflecting on Israel's policy problems and potential remedies

## ■ THE WEXNER FOUNDATION

The goal of The Wexner Foundation is to be a source of enduring benefit to humankind, with a special commitment toward strengthening Jewish life in North America and throughout the world

In addition to the Wexner-Israel Fellowship, the Foundation sponsors a Graduate Fellowship Program designed to attract the most promising young men and women to undertake graduate training for careers in the rabbinate, Jewish education, Jewish studies, Jewish communal service and the cantorate in North America

## ■ THE KENNEDY SCHOOL

Harvard's John F Kennedy School of Government serves the public interest by preparing leaders for service in government and other institutions in democratic societies, and by contributing to the solution of important public problems

The Kennedy School of Government is dedicated to learning through research, professional education and systematic and sustained relationships with the scholarly community and practitioners from the public and private sectors

## ■ THE MASTER IN PUBLIC ADMINISTRATION DEGREE PROGRAM

The Lucius N Littauer Master in Public Administration (MPA) degree

## Advisory Committee

Chairman Itamar Rabinovich,
President, Tel-Aviv University
Edna Arbel, Israel State Attorney
Hannan Bar-On, Senior Advisor to the President,
Weizmann Institute of Science
David Brodet, Chairman, "Yes" TV Satellite Company
Joseph Ciechanover, Chairman, Board of Directors, El-Al Israel Airlines
Walter Eytan, first Director General of the Minsitry of Foreign Affairs, former Ambassador to France, and former Chairman of Israel Broadcasting Authority
Avraham Friedman, Executive Director of the Jerusalem Institute for Israel Studies, Associate Professor at the Jerusalem School of Business Administration at the Hebrew University of Jerusalem
Mayer Gabay, Judge, Vice President, on the United Nations Administrative Tribunal
Izhak Galnoor, Professor of Political Science, The Hebrew University of Jerusalem
Avi Gil, Director General, Ministry of Regional Cooperation
Shmuel Hollander, Civil Service Commissioner
Teddy Kollek, former Mayor of Jerusalem
Charles Liebman, Director of the Argov Center and Professor of Political Studies, Bar-Ilan University
Yehoshua Maor, Hi-Tech entrepeneur, former Director General, I B M , Israel
Leora Meridor, Senior Assistant General Manager, Head of Credit Division, The First International Bank of Israel
Roni Milo, former Mayor of Tel-Aviv
Larry S Moses, President, The Wexner Foundation
Joseph Tamir, Director General J D C "Ashalim", former Director General of the National Insurance Institute

## Program Support

The Wexner-Israel Fellowship Program is administered by coordinators in Israel and at the Kennedy School
For further information, contact


Bilha Gus
Wexner-Israel Fellowship
Program Coordinator
8 Marcus St
Jerusalem 92232
ISRAEL
(02) 563-7035

Shula Gilad
John F Kennedy School
of Government Coordinator
79 John F Kennedy Street
Cambridge, MA 02138
U S A
(617) 496-7113


rogram offers experienced professionals an opportunity to learn new anagement, policy making, and quantitative skills that are practical nd immediately useful

- The Mid-Career Program includes approximately 215 students who, n average, are 38 years old with 13 years of professional experience
- Students must have at least five years of experience in the public ervice to be considered for admission
- To graduate, candidates for the MPA degree nust complete an academic ear of course work including at least eight one-semester courses
- In consultation with a faculty advisor, students design individual tudy plans tailored to their own needs and career plans
- Approximately half of those participating in the MPA program already iold advanced university degrees, and each year almost 50% are nternational students
- The primary method of instruction at the School is through case tudies The cases provide the basis for class discussions so that students iave an opportunity to interact with the faculty and express their own pinions and perspectives to other class members

## ELIGIBILITY

The Fellowship Program is open to outstanding Israeli government nd municipal officials and professionals in areas of the public sector uch as, Bank of Israel, Israel Broadcast Authority, National Insurance nstitute, Ports Authority and others These officials should

- have at least five years of substantial professional experience in he public sector or in public interest organizations and be committed o careers in the public interest,
- have a professional career reflecting significant demonstrated eadership and the ability to perform well in a rigorous, interdisciplinary cademic program,
- pass a required English examination showing language ability sufficient o meet Harvard's standards, and
- be likely to achieve important leadership positions in Israel upon heir return, recipients also obligate themselves to at least three years ontinued service in the Israeli public sector following completion of the program

## AWARDS

The Wexner-Israel Fellowship will cover tuition expenses and fees at he Kennedy School plus health insurance, a book allowance, travel from Israel, and limited moving costs. The award includes a living stipe of $1,800 per month for single students or $2,200 per month f participants with accompanying spouses Families with children w receive an additional $200 per child per month

Fellowships will be granted for an 11-month period during which t Fellows will complete the Mid-Career Master in Public Administrati Program. This includes the Summer Program and Foundation-sponsor seminars *

As the hub of the university-wide program in public policy, the Kenne School ensures its students access to courses in all the faculties of t University (Law, Business, Arts & Sciences, Public Health, Medicir as well as to the Massachusetts Institute of Technology and the Fletc School of Law and Diplomacy Fellows will have access to all the resour of Harvard University including a curriculum of over 3,000 cours 10 professional schools, the largest university library system in the wo and a full-time faculty numbering several thousan

* For some, a two month Summer Program will be required

## PROCEDURES

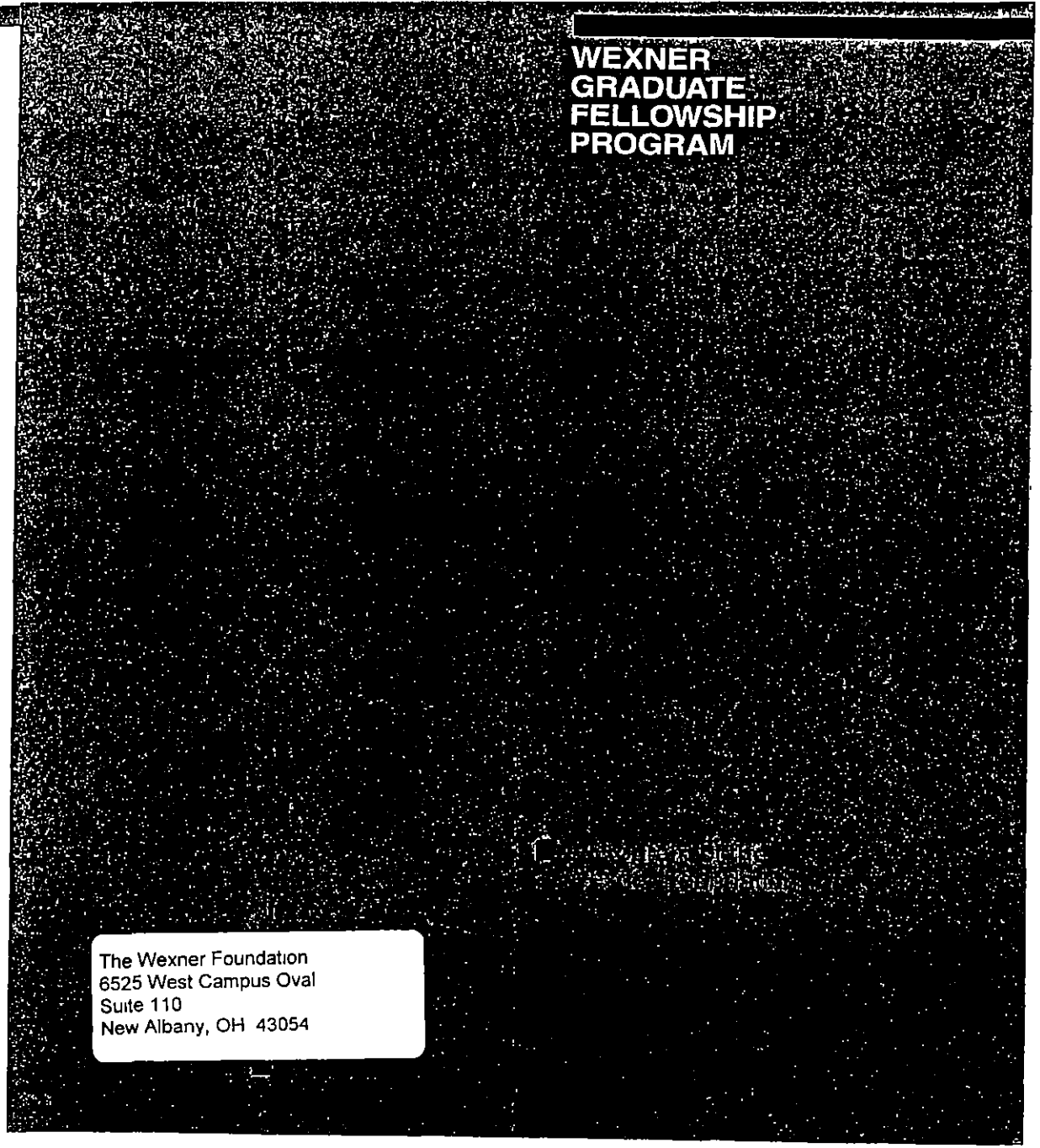
Applications and information are available from the Wexner-Foundati Office in Israel or from the Kennedy School of Government. Applica will be required to submit

- A completed application form, including personal essays (three cop
- Academic transcripts (one original and two copi
- 3 letters of recommendation (one from current professional supervi
- 1 passport picture
- Scores of a recent TOEFL, of no less than 250, must be submit with the completed application (check with fellowship office for deta

It is strongly recommended but not required that results fro standardized test such as GMAT or GRE also be submitt Completed application, letters of recommendation and TOEFL sc are due no later than November 15 The last day to request applicat materials is October 15

Approximately 25 finalists will be interviewed by the selection commi in January The finalists will be informed approximately two we before the interviews A reception and orientation session will be h for the new Wexner-Israel Fellows in April

The future of the North American Jewish community is increasingly dependent upon the recruitment of professional leaders who possess vision and strong leadership abilities. Only the highest calibre of leadership will be capable of guiding the next generation of Jewish religious, educational and communal life. Diverse opportunities for fulfilling careers await those who respond to this challenge.




The Wexner Foundation
6525 West Campus Oval
Suite 110
New Albany, OH 43054

# GRADUATE FELLOWSHIP PROGRAM

## THE WEXNER FOUNDATION

The goal of the Wexner Foundation is to be a source of enduring benefit to humankind with a special commitment toward strengthening Jewish life in North America and throughout the world

**The Wexner Graduate Fellowship Program** is an initiative undertaken by the Foundation to meet the challenge of enhancing and improving professional Jewish leadership in North America The program is designed to attract promising and committed men and women into professional leadership careers in the North American Jewish community

The career areas designated for Wexner Graduate Fellows are

- **Jewish Education**
- **Jewish Communal Service**
- **Rabbinate**
- **Cantorate**
- **Jewish Studies**

It is hoped that Wexner Graduate Fellows will become a significant force for the creative revitalization of Jewish life in North America

## AWARDS

Wexner Graduate Fellowships cover all tuition expenses and required fees plus a generous living stipend

Fellowships are granted for a two year period and may be renewed for a one or two-year term by the Graduate Fellowship Committee Each year of support is contingent upon evidence of satisfactory academic achievement

Fellows are required to engage in full-time graduate study and to attend special programs held during the course of the year including annual interdisciplinary institutes The purposes of these programs are to create a cohesive community of Fellows and to impact upon the leadership and skill development of each Fellow

Wexner Graduate Fellows are afforded unique opportunities for ongoing interaction with outstanding Jewish leaders and for extensive interchange with each other Wexner Graduate Fellows participate in an experience that is intended to be of benefit to them throughout their careers

## ELIGIBILITY

Fellowships are awarded to North Americans who are college graduates and who plan to enter a qualifying graduate program in preparation for a career in Jewish education, Jewish communal service, the Rabbinate, the Cantorate or Jewish studies Wexner Graduate Fellowships are limited to those who have not yet begun their professional training Applicants with graduate work in a different field who wish to make a shift into one of the above areas, are also eligible Only individuals who plan to pursue a career in the North American Jewish community are eligible to apply to the program

Awards are given to outstanding candidates who have a strong personal commitment to the Jewish community who have demonstrated excellence in academic achievement and who possess the potential to assume major roles of professional leadership in North American Jewish communal life

## PROCEDURES

Applications must be initiated by the applicants themselves Applicants will be required to submit

- A completed application form
- Personal essays
- Transcripts of academic record
- Letters of recommendation
- Scores on the General Test of the Graduate Record Examination (Institution #3134)

Finalists are required to be available for personal interviews at the Foundation's expense

The full set of application materials must be completed and submitted to the Wexner Foundation Graduate Fellowship Program by February 1 Awards are announced in May for the ensuing academic year

Fellows are selected by the Graduate Fellowship Committee, which is composed of leading academicians and professionals who are committed to the professional fields encompassed by the program

For full application information contact

Director of the Graduate Fellowship Program
The Wexner Foundation
6525 West Campus Oval
Suite 110
New Albany, OH 43054
(614) 939-6060

THE WEXNER FOUNDATION
DEPRECIATION SCHEDULE
23 7320631

| Date | Description | Cost | Method | 2001 Depreciation | Accu Depreciation |
|---|---|---|---|---|---|
| | Furniture Fixtures & Equipment | | | | |
| | Furniture & Fixtures | | | | |
| 3 87 | Continental Office Furniture | 14 299 60 | 10yr S/L | 0 00 | 14 299 60 |
| 5-87 | Continental Office Furniture | 5 409 22 | 10yr S/L | 0 00 | 5 409 22 |
| 5 87 | Continental Office Furniture | 3 035 00 | 10yr S/L | 0 00 | 3 035 00 |
| 10-88 | Roche Bubol Table | 3 516 00 | 10yr S/L | 0 00 | 3 516 00 |
| 10 88 | Continental Office Furniture & Cabinets | 15 665 00 | 10yr S/L | 0 00 | 15 665 00 |
| 10-88 | Tadiran | 5 854 00 | 10yr S/L | 0 00 | 5 854 00 |
| 12 88 | Continental Office Furniture & Cabinets | 5 274 00 | 10yr S/L | 0 00 | 5 274 00 |
| 12-88 | Art Exchange Paintings | 3 010 00 | 10yr S/L | 0 00 | 3 010 00 |
| 12 88 | M A Fox Credenza | 3 810 00 | 10yr S/L | 0 00 | 3 810 00 |
| 12 88 | M A Fox Conference Table | 5 385 00 | 10yr S/L | 0 00 | 5 385 00 |
| 2 89 | Continetial Radius Board | 1 073 00 | 10yr S/L | 0 00 | 1 073 00 |
| 2 89 | Forbus Table | 3 225 00 | 10yr S/L | 0 00 | 3 225 00 |
| 2 89 | Continetial Desk | 7 870 00 | 10yr S/L | 0 00 | 7 870 00 |
| 2 89 | Continetial Chair | 1 096 00 | 10yr S/L | 0 00 | 1 096 00 |
| 2 89 | Continetial Files | 1 413 00 | 10yr S/L | 0 00 | 1 413 00 |
| 5-89 | Continetial Chair | 1 085 00 | 10yr S/L | 0 00 | 1 085 00 |
| 1 89 | Builders Appliance Refridge | 1 248 00 | 10yr S/L | 0 00 | 1 248 00 |
| 5-95 | Office Dynamics-Silentcom | 1 498 76 | 10yr S/L | 149 88 | 974 19 |
| 7 96 | Ricoh Fax | 1 984 00 | 10yr S/L | 198 40 | 1 091 20 |
| 3-99 | New York Office Furniture + Equip | 21 915 62 | 10yr S/L | 2 191 56 | 5 478 90 |
| 3-99 | New York Office Carpet | 2 800 00 | 10yr S/L | 280 00 | 700 00 |
| 4-00 | Microman Computers | 1 819 00 | 10yr S/L | 181 90 | 272 85 |
| 8-00 | Microman Computers | 3 794 00 | 10yr S/L | 379 40 | 569 10 |
| 10- 00 | Work Station 2 Bookcases | 3 411 00 | 10yr S/L | 341 10 | 511 65 |
| 11 00 | Office Furniture | 38 939 80 | 10yr S/L | 3 893 98 | 5 840 97 |
| 6-01 | Computer Equipment | 18 074 86 | 10yr S/L | 903 74 | 903 74 |
| | | $158 430 00 | | $7 616 22 | $97 706 69 |

THE WEXNER FOUNDATION
DEPRECIATION SCHEDULE
23 7320631

| Date | Description | Cost | Method | 2001 Depreciation | Accu Depreciation |
|---|---|---|---|---|---|
| | Furniture & Fixtures Israel | | | | |
| 8-89 | Buchanan Bdrm Furn | 1 089 50 | 10yr S/L | 0 00 | 1 089 50 |
| 9-89 | Israel Bank Wire | 2 094 00 | 10yr S/L | 0 00 | 2 094 00 |
| 10-89 | Lazarus-Linens | 633 77 | 10yr S/L | 0 00 | 633 77 |
| 11 89 | Riverside Casual Furn -Chair | 298 05 | 10yr S/L | 0 00 | 298 05 |
| 11 89 | K A Menendian Inc Rug | 1 360 00 | 10yr S/L | 0 00 | 1 360 00 |
| 11-89 | Interior Crafts Chair | 1 736 00 | 10yr S/L | 0 00 | 1 736 00 |
| 11 89 | Marshall Fields Furn | 1 828 90 | 10yr S/L | 0 00 | 1 828 90 |
| 11 89 | Williams Kitchen Stuff | 415 00 | 10yr S/L | 0 00 | 415 00 |
| 11-89 | Lazarus-Furn | 3 001 51 | 10yr S/L | 0 00 | 3 001 51 |
| 11 89 | Intercont Appliances Appliances | 2 020 00 | 10yr S/L | 0 00 | 2 020 00 |
| 11 89 | Pur Israel Furn Furniture | 2 729 63 | 10yr S/L | 0 00 | 2 729 63 |
| 11 89 | Roche Dubois Tables | 7 129 35 | 10yr S/L | 0 00 | 7 129 35 |
| 8-89 | Riverside Casual Furn Chair | 336 00 | 10yr S/L | 0 00 | 336 00 |
| 8-89 | Riverside Casual Furn Chair | 531 00 | 10yr S/L | 0 00 | 531 00 |
| 8-89 | Whites Furniture Dining Rm | 649 95 | 10yr S/L | 0 00 | 649 95 |
| 8 89 | Whites Furniture Dining Rm | 4 410 00 | 10yr S/L | 0 00 | 4 410 00 |
| 8-89 | K A Menendian Inc Rug | 4 720 00 | 10yr S/L | 0 00 | 4 720 00 |
| 10-89 | Tadiran-Computer | 9 598 20 | 7yr S/L | 0 00 | 9 598 20 |
| 12-89 | Roche-Dubois-Tables | 2 034 55 | 10yr S/L | 0 00 | 2 034 55 |
| 12-89 | AeroCustomWindowFash-Drapes | 2 500 00 | 10yr S/L | 0 00 | 2 500 00 |
| 12-89 | Ohio Plate Glass-Table | 861 00 | 10yr S/L | 0 00 | 861 00 |
| 12-89 | Buchanan Bdrm Furn | 1 089 50 | 10yr S/L | 0 00 | 1 089 50 |
| 12 89 | Petty Cash Various | 2 094 74 | 10yr S/L | 0 00 | 2 094 74 |
| 2-90 | Elgee Electric | 960 96 | 10yr S/L | 0 00 | 960 96 |
| 5-90 | Aero Custom-Drapes | 2 373 00 | 10yr S/L | 0 00 | 2 373 00 |
| 6-90 | Roche Bobios | 1 450 00 | 10yr S/L | 0 00 | 1 450 00 |
| 6 90 | Furniture | 317 46 | 10yr S/L | 0 00 | 317 46 |
| 6-90 | Furniture | 246 56 | 10yr S/L | 0 00 | 246 56 |
| 10-90 | Furniture | 4 269 90 | 10yr S/L | 0 00 | 4 269 90 |
| 11 90 | Copier | 2 403 38 | 10yr S/L | 0 00 | 2 403 38 |
| | | $65 181 91 | | $0 00 | $65 181 91 |
| | Israel Leasehold Improvements | | | | |
| 1 98 | Israel Marcus 8 | 22 723 47 | 31 5yr S/L | 721 47 | 2 855 66 |
| | | 22 723 47 | | 721 47 | 2 855 66 |

**The Wexner Heritage Foundation**

551 Madison Avenue
New York New York 10022
212 355 6115
Fax 212 751 3739

July 31,2002

Leslie H Wexner
The Wexner Foundation
6525 West Campus Oval
Suite 105
New Albany, Ohio 43054

Re Grants to Wexner Heritage Foundation

Dear Leslie

Per the requirements of the expenditure responsibility code section of the Internal Revenue Code, we have enclosed a copy of our 2001 receipts and disbursements and our 2001-2002 school year budget The use of the grants is for the total operations of the Wexner Heritage Foundation which include charitable, educational, religious, scientific and literary purposes Please be advised that we also make these reports available to you on a monthly basis

Please contact us with any questions

WEXNER HERITAGE FOUNDATION

Darren Indyke
Secretary

WEXNER FOUNDATION
Grant Procedure Modification
Pursuant To Reg. 53.4945–4(d)

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Grant Making procedures as provided under your advance approval letter dated 5–25–88(copy attached) have been modified The Foundation believes the modification does not materially change the procedures from those described in the request to the Commissioner

Providing the following modification is determined to be material, we request approval of the modification.

Modification– Living stipends are paid directly to individual fellows/fellas when college or university refuses to accept and disburse living stipend funds to the respective fellows/fellas. The Foundation correspondingly assumes expenditure responsibility under Sec. 4945(h) for the living stipend payments.

Form **8868**
(December 2000)

Department of the Treasury
Internal Revenue Service

# Application for Extension of Time to File an Exempt Organization Return

► File a separate application for each return

OMB No 1545 1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ► [X]
- If you are filing for an **Additional (not automatic) 3-Month Extension, complete only Part II** (on page 2 of this form)

**Note** *Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868*

**Part I** **Automatic 3-Month Extension of Time** — Only submit original (no copies needed)

**Note** *Form 990-T corporations requesting an automatic 6 month extension — check this box and complete Part I only* ► [ ]

*All other corporations (including Form 990 C filers) must use Form 7004 to request an extension of time to file income tax returns Partnerships REMICs and trusts must use Form 8736 to request an extension of time to file Form 1065, 1066, or 1041*

Type or print
File by the due date for filing your return See instructions

| Name of Exempt Organization | Employer Identification Number |
|---|---|
| Wexner Foundation | 23-7320631 |

Number Street, and Room or Suite Number If a P O Box see instructions
6525 West Campus Oval, Suite 105

City, Town or Post Office For a foreign address, see instructions | State | ZIP Code
New Albany | Oh | 43054

**Check type of return to be filed** (file a separate application for each return)

| | | |
|---|---|---|
| [ ] Form 990 | [ ] Form 990 T (corporation) | [ ] Form 4720 |
| [ ] Form 990 BL | [ ] Form 990 T (Section 401(a) or 408(a) trust) | [ ] Form 5227 |
| [ ] Form 990 EZ | [ ] Form 990-T (trust other than above) | [ ] Form 6069 |
| [X] Form 990-PF | [ ] Form 1041 A | [ ] Form 8870 |

- If the organization does **not** have an office or place of business in the United States, check this box ► [ ]
- If this is for a **group return**, enter the organization s four digit Group Exemption Number (GEN) _____ If this is for the **whole** group, check this box ► [ ] If it is for part of the group, check this box ► [ ] and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3 month (6 month, for **990-T corporation**) extension of time until Aug 15, 20 02,
to file the exempt organization return for the organization named above The extension is for the organization's return for
► [X] calendar year 20 01 or
► [ ] tax year beginning _____, 20 ____, and ending _____, 20 ____

2 If this tax year is for less than 12 months, check reason [ ] Initial return [ ] Final return [ ] Change in accounting period

| | | |
|---|---|---|
| **3a** If this application is for Form 990 BL, 990-PF, 990 T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions | $ | 122,819 |
| **b** If this application is for Form 990 PF or 990 T, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit | $ | 119,926 |
| **c Balance Due** Subtract line 3b from line 3a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions | $ | 2,893 |

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this return including accompanying schedules and statements, and to the best of my knowledge and belief it is true correct and complete, and that I am authorized to prepare this form

Signature ► Paul Bunkhardt Title ► CPA Date ► 5-10-02

**BAA For Paperwork Reduction Act Notice, see instructions** Form 8868 (12 2000)

FIFZ0501 11/27/01